

PROFESSIONAL SERVICES AGREEMENT BETWEEN THE CITY OF EUSTIS, FLORIDA AND M.T. CAUSLEY, LLC

This Professional Services Agreement ("Agreement") is entered into by and between the City of Eustis, a Florida registered municipal corporation ("Municipality") and M.T. Causley, LLC, a wholly owned subsidiary of SAFEbuilt, LLC ("Consultant"). The Municipality and the Consultant shall be jointly referred to as the "Parties".

RECITALS

WHEREAS, the Municipality's procurement ordinance and procedures permit the purchase of goods and/or services by "piggyback" on agreements awarded by other government entities; and

WHEREAS, Consultant is ready, willing, and able to perform the services previously contracted with the Town of Astatula, Florida in accordance with the Agreement entered into March 24, 2020 pursuant to Request for Proposals for Building Inspection Services (RFP); and

WHEREAS, Amendment One to the Town of Astatula's Agreement was executed January 27, 2023 with the purpose of increasing the hourly rates based on the Consumer Price Index; and

WHEREAS, Municipality and the Consultant have determined that the Town of Astatula's Agreement is an acceptable agreement upon which the Municipality and the Consultant shall establish a cooperative agreement; and

NOW THEREFORE, for good and valuable consideration, the sufficiency of which is hereby acknowledged, the Municipality and Consultant agree as follows:

1. TERM AND CONDITIONS

Except as otherwise stated herein; the terms and conditions of the Town of Astatula Agreement shall form the bases of this Agreement with the Municipality. A true and correct copy of the Town of Astatula Agreement and Amendment is attached as Exhibit A. The Town of Astatula Agreement is hereby incorporated into the Agreement and shall be the controlling document.

2. COMMENCEMENT AND COMPLETION

This Agreement shall be effective on the latest date on which this Agreement is fully executed by both Parties and shall expire, as per the terms of the Town of Astatula Agreement, on March 24, 2024. Contingent upon the renewal of the Town of Astatula Agreement, the Agreement shall automatically renew for twelve (12) month terms, unless prior written notification is delivered to either Party no less than thirty (30) days in advance of the renewal date of this Agreement. In the absence of written documentation, this Agreement will continue in force until such time as either Party notifies the other of their desire to terminate this Agreement.

3. CHANGES TO SCOPE OF SERVICES

Any changes to Services between the Municipality and Consultant shall be made in writing that shall specifically designate any changes in Service levels and compensation for the Services. Both Parties shall determine a mutually agreed upon solution to alter services levels and a transitional timeframe that is mutually beneficial to both Parties. No changes shall be binding absent a written Agreement or Agreement Amendment executed by both Parties.

4. SCOPE OF SERVICE

Consultant shall provide code compliant inspection and plan review services five days per week during normal business hours in addition to professional planning services. Consultant will perform Services in accordance with codes, amendments and ordinances adopted by the elected body of Municipality. The qualified

professionals employed by Consultant will maintain current certifications, certificates, licenses as required for Services that they provide to Municipality in accordance with State of Florida, Chapter 468, Florida Statutes.

5. **FEE SCHEDULE**

- Upon completion of the initial term and annually thereafter, the hourly rates listed shall be increased based upon the annual increase in the Department of Labor, Bureau of Labor Statistics or successor thereof, Consumer Price Index (United States City Average, All Items (CPI-U), Not Seasonally adjusted, All Urban Consumers, referred to herein as the “CPI”) for the Municipality or, if not reported for the Municipality the CPI for cities of a similar size within the applicable region from the previous calendar year, such increase, however, not to exceed 4% per annum. The increase will become effective upon publication of the applicable CPI data. If the index decreases, the rates listed shall remain unchanged.
- Consultant fees for Services provided pursuant to this Agreement will be as follows:

Services	Standard Hourly Rate
Building Official	\$109.00 per hour – two (2) hour minimum
– Residential and Commercial Inspection (all Trades)	
– Residential and Commercial Plan Review (all Trades)	
– Flood Plain Management	
– Code Enforcement Services	
Additional Staff – as requested by Municipality	
Residential and Commercial Inspection Services – Includes Building, Electrical, Plumbing and Mechanical	\$100.00 per hour - two (2) hour minimum
Residential and Commercial Plan Review Services – Includes Building, Electrical, Plumbing and Mechanical	\$100.00 per hour - two (2) hour minimum
Fire Plan Review and Inspection Services	\$109.00 per hour - two (2) hour minimum
Planning Tech/Associate Planner	\$104.00 per hour – two (2) hour minimum
Senior Planner	\$172.00 per hour – two (2) hour minimum
Grant Writing & Administration	\$143.00 per hour
GIS Specialist	\$143.00 per hour
Code Enforcement (provided by other than the Building Official)	\$75.00 per hour – two (2) hour minimum
Weekend/After Hours/Emergency Inspection Services	\$218.00 per hour - two (2) hour minimum

Time tracked will start when staff checks in at the Municipality or first inspection site

6. **INVOICE & PAYMENT STRUCTURE**

Consultant will invoice the Municipality on a monthly basis and provide all necessary supporting documentation. All payments are due to Consultant within 30 days of Consultant’s invoice date. Payments owed to Consultant but not made within sixty (60) days of invoice date shall bear simple interest at the rate of one and one-half percent (1.5%) per month. If payment is not received within ninety (90) days of invoice date, Services will be discontinued until all invoices and interest are paid in full. The Municipality may request, and the Consultant shall provide, additional information before approving the invoice. When additional information is requested the Municipality will identify specific disputed item(s) and give specific reasons for any request. Undisputed portions of any invoice shall be due within 30 days of Consultants invoice date, if additional information is requested, Municipality will submit payment within thirty (30) days of resolution of the dispute.

7. TERMINATION

Either party may terminate this Agreement, or any part of this Agreement upon ninety (90) days written notice, with or without cause and with no penalty or additional cost beyond the rates stated in this Agreement. In case of such termination, Consultant shall be entitled to receive payment for work completed up to and including the date of termination within thirty (30) days of the termination.

8. NOTICES

Any notice under this Agreement shall be in writing and shall be deemed sufficient when presented in person, or sent, pre-paid, first class United States Mail, or delivered by electronic mail to the following addresses:

If to the Municipality:

Tom Carrino, Manager
City of Eustis
10 N. Grove Street
Eustis, FL 32726
Email: Eustiscm@eustis.org

CC: Michael Lane, Director of Development Services
Email: lanem@eustis.org

If to the Consultant:

Matt K. Causley, President
M.T. Causley, LLC
10720 Caribbean Blvd, Suite 650
Cutler Bay, FL 33189
Email: mtc@mtcinspectors.com

CC: Jessica Adkins, Account Manager
Email: jadkins@safebuilt.com

9. FORCE MAJEURE

Any delay or nonperformance of any provision of this Agreement by either Party (with the exception of payment obligations) which is caused by events beyond the reasonable control of such party, shall not constitute a breach of this Agreement, and the time for performance of such provision, if any, shall be deemed to be extended for a period equal to the duration of the conditions preventing such performance.

10. WAIVER

Failure to enforce any provision of this Agreement shall not be deemed a waiver of that provision. Waiver of any right or power arising out of this Agreement shall not be deemed waiver of any other right or power.

11. INDEPENDENT CONTRACTOR

Consultant is an independent contractor, and, except as provided otherwise in this section, neither Consultant, nor any employee or agent thereof, shall be deemed for any reason to be an employee or agent of Municipality. Municipality shall have no liability or responsibility for any direct payment of any salaries, wages, payroll taxes, or any and all other forms or types of compensation or benefits to any personnel performing services for Municipality under this Agreement. Consultant shall be solely responsible for all compensation, benefits, insurance and employment-related rights of any person providing Services hereunder during the course of or arising or accruing as a result of any employment, whether past or present, with Consultant.

Consultant and Municipality agree that Consultant will provide similar service to other clients while under contract with Municipality and Municipality acknowledges that Consultant employees may provide similar services to multiple clients. Consultant shall at its sole discretion assign and reassign qualified employees, as determined by Consultant, to perform services for Municipality. Municipality may request that a specific employee be assigned to or reassigned from work under this Agreement and Consultant shall consider that

request when determining staffing. Consultant shall determine all conditions of employment for its employees, including hours, wages, working conditions, promotion, discipline, hiring and discharge. Consultant exclusively controls the manner, means and methods by which services are provided to Municipality, including attendance at meetings, and Consultant's employees are not subject to the direction and control of Municipality. Except where required by Municipality to use Municipality information technology equipment or when requested to perform the services from office space provided by the Municipality, Consultant employees shall perform the services using Consultant information technology equipment and from such locations as Consultant shall specify. No Consultant employee shall be assigned a Municipal email address as their exclusive email address and any business cards or other IDs shall state that the person is an employee of Consultant or providing Services pursuant to a contractual agreement between Municipality and Consultant.

It is the intention of the Parties that Consultant shall be deemed to be an agent of the Municipality for purposes of Section 768.28 Florida Statute.

12. INDEMNIFICATION

To the fullest extent permitted by law, Consultant shall defend, indemnify, and hold harmless Municipality, its elected and appointed officials, employees and volunteers and others working on behalf of Municipality, from and against any and all third-party claims, demands, suits, costs (including reasonable legal costs), expenses, and liabilities ("Claims") alleging personal injury, including bodily injury or death, and/or property damage, but only to the extent that any such Claims are caused by the negligence of Consultant or any officer, employee, representative, or agent of Consultant. Consultant shall have no obligations under this Section to the extent that any Claim arises as a result of Consultants compliance with Municipal law, ordinances, rules, regulations, resolution, executive orders or other instructions received from Municipality.

To the fullest extent permitted by law and without waiver of governmental immunity, Municipality shall defend, indemnify, and hold harmless Consultant, its officers, employees, representatives, and agents, from and against any and all Claims alleging personal injury, including bodily injury or death, and/or property damage, but only to the extent that such Claims are caused by (a) the negligence of, or material breach of any obligation under this Agreement by, Municipality or any officer, employee, representative, or agent of Municipality or (b) Consultant's compliance with Municipal law, ordinances, rules, regulations, resolutions, executive orders or other instructions received from Municipality. If either Party becomes aware of any incident likely to give rise to a Claim under the above indemnities, it shall notify the other and both Parties shall cooperate fully in investigating the incident.

13. LIMITS OF LIABILITY

EXCEPT ONLY AS MAY BE EXPRESSLY SET FORTH HEREIN, CONSULTANT EXPRESSLY DISCLAIMS ANY AND ALL WARRANTIES OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, ERROR-FREE OPERATION, PERFORMANCE, ACCURACY, OR NON-INFRINGEMENT. EXCEPT TO THE EXTENT ARISING FROM MUNICIPALITY'S PAYMENT OBLIGATIONS FOR SERVICES, IN NO EVENT SHALL CONSULTANT OR MUNICIPALITY BE LIABLE TO ONE ANOTHER FOR INDIRECT, INCIDENTAL, CONSEQUENTIAL, RELIANCE, EXEMPLARY, OR SPECIAL DAMAGES INCLUDING WITHOUT LIMITATION, DAMAGES FOR LOST PROFITS, LOST REVENUES, LOST DATA OR OTHER INFORMATION, OR LOST BUSINESS OPPORTUNITY, REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT, INDEMNITY, NEGLIGENCE, WARRANTY, STRICT LIABILITY, OR TORT, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES AND NOTWITHSTANDING THE FAILURE OF ESSENTIAL PURPOSE OF ANY REMAINING REMEDY. EXCEPT WITH RESPECT TO PAYMENT OBLIGATIONS FOR SERVICES, IN NO EVENT SHALL THE LIABILITY OF MUNICIPALITY OR CONSULTANT UNDER THIS AGREEMENT FROM ANY CAUSE OF ACTION WHATSOEVER (REGARDLESS OF THE FORM OF ACTION, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER LEGAL THEORY, AND WHETHER ARISING BY NEGLIGENCE, INTENTIONAL CONDUCT, OR OTHERWISE) EXCEED THE GREATER OF THE AMOUNT OF FEES PAID TO CONSULTANT PURSUANT TO THIS AGREEMENT OR THE AVAILABLE LIMITS OF CONSULTANTS INSURANCE (SUCH LIMITS DEFINE MUNICIPAL MAXIMUM LIABILITY TO THE SAME EXTENT AS IF MUNICIPALITY HAD BEEN OBLIGATED TO PURCHASE THE POLICIES).

14. SOLICITATION/HIRING OF CONSULTANT'S EMPLOYEES

During the term of this Agreement and for one year thereafter, Municipality shall not solicit, recruit or hire, or attempt to solicit, recruit or hire, any employee or former employee of Consultant who provided services to Municipality pursuant to this Agreement ("Service Providers"), or who interacted with Municipality in connection with the provision of such services (including but not limited to supervisors or managers of Service Providers, customer relations personnel, accounting personnel, and other support personnel of Consultant). The Parties agree that this provision is reasonable and necessary in order to preserve and protect Consultant's trade secrets and other confidential information, its investment in the training of its employees, the stability of its workforce, and its ability to provide competitive building department programs in this market. If any provision of this section is found by a court or arbitrator to be overly broad, unreasonable in scope or otherwise unenforceable, the Parties agree that such court or arbitrator shall modify such provision to the minimum extent necessary to render this section enforceable. In the event that Municipality hires any such employee during the specified period, Municipality shall pay to Consultant a placement fee equal to 100% of the employee's annual salary including bonus and training cost.

15. OWNERSHIP OF DOCUMENTS

Except as expressly provided in this Agreement, Municipality shall retain ownership of all Materials and of all work product and deliverables created by Consultant pursuant to this Agreement. The Materials, work product and deliverables shall be used by Consultant solely as provided in this Agreement and for no other purposes without the express prior written consent of Municipality. As between Municipality and Consultant, all work product and deliverables shall become the exclusive property of Municipality when Consultant has been compensated for the same as set forth herein, and Municipality shall thereafter retain sole and exclusive rights to receive and use such materials in such manner and for such purposes as determined by it. Notwithstanding the preceding, Consultant may use the Materials, work product, deliverables, applications, records, documents and other materials provided to perform the Services or resulting from the Services, for purposes of (i) benchmarking of Municipality's and other client's performance relative to that of other groups of customers served by Consultant; (ii) improvement, development marketing and sales of existing and future Consultant services, tools and products; (iii) monitoring Service performance and making improvements to the Services. For the avoidance of doubt, Municipality Data will be provided to third parties, other than hosting providers, development consultants and other third parties providing services for Consultant, only on an anonymized basis and only as part of a larger body of anonymized data. If this Agreement expires or is terminated for any reason, all records, documents, notes, data and other materials maintained or stored in Consultant's secure proprietary software pertaining to Municipality will be exported into a CSV file and become property of Municipality. Notwithstanding the preceding, Consultant shall own all rights and title to any Consultant provided software and any improvements or derivative works thereof.

Upon reasonable prior written notice, Municipality and its duly authorized representatives shall have access to any books, documents, papers and records of Consultant that are related to this Agreement for the purposes of audit or examination, other than Consultant's financial records, and may make excerpts and transcriptions of the same at the cost and expense of Municipality.

16. MUNICIPALITY OBLIGATIONS

Municipality shall timely provide all data information, plans, specifications and other documentation reasonably required by Consultant to perform Services (Materials). Municipality has the right to grant and hereby grants Consultant a fully paid up, non-exclusive, non-transferable license to use the Materials in accordance with the terms of this Agreement.

17. ASSIGNMENT AND SUBCONTRACT

Neither party shall assign all or part of its rights or obligations under this Agreement to another entity without the written approval of both Parties; consent shall not be unreasonably withheld. Notwithstanding the preceding, Consultant may assign this Agreement in connection with the sale of all or substantially all of its assets or ownership interest, effective upon notice to Municipality, and may assign this Agreement to its parent, subsidiaries or sister companies (Affiliates) without notice to Municipality. Consultant may subcontract any or all of the services to its Affiliates without notice to Municipality. Consultant may

subcontract any or all of the services to other third parties provided that Consultant gives Municipality prior written notice of the persons or entities with which Consultant has subcontracted. Consultant remains responsible for any Affiliate's or subcontractor's performance or failure to perform. Affiliates and subcontractors will be subject to the same performance criteria expected of Consultant. Performance clauses will be included in agreements with all subcontractors to assure quality levels and agreed upon schedules are met.

18. CONFLICT OF INTEREST

Consultant shall refrain from providing services to other persons, firms, or entities that would create a conflict of interest for Consultant with regard to providing the Services pursuant to this Agreement. Consultant shall not offer or provide anything of benefit to any Municipal official or employee that would place the official or employee in a position of violating the public trust as provided under Municipality's charter and code of ordinances, state or federal statute, case law or ethical principles.

19. CONSULTANT ACCESS TO RECORDS

Parties acknowledge that Consultant requires access to Records in order for Consultant to perform its obligations under this Agreement. Accordingly, Municipality will either provide to Consultant on a daily basis such data from the Records as Consultant may reasonably request (in an agreed electronic format) or grant Consultant access to its Records and Record management systems so that Consultant may download such data. Data provided to or downloaded by Consultant pursuant to this Section shall be used by Consultant solely in accordance with the terms of this Agreement.

20. E-VERIFY/VERIFICATION OF EMPLOYMENT STATUS

Pursuant to FS 448.095, Consultant certifies that it is registered with and uses the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by Consultant during the term of the Agreement. Consultant shall not knowingly employ or contract with an illegal alien to perform work under this Agreement and will verify immigration status to confirm employment eligibility. If Consultant enters into a contract with a subcontractor to perform work or provide services pursuant to the Agreement, Consultant shall likewise require the subcontractor to comply with the requirements of FS 448.095, and the subcontractor shall provide to Consultant an affidavit stating that the subcontractor does not employ, contract with or subcontract with an unauthorized alien. Consultant will maintain a copy of such affidavit for the duration of its contract with owner. Consultant is prohibited from using the E-Verify program procedures to undertake pre-employment screening of job applicants while this Agreement is being performed.

21. SCRUTINIZED COMPANIES

Consultant verifies that it and any of its affiliates are not scrutinized companies as identified in Section 287.135, F.S. In addition, Consultant agrees to observe the requirements of Section 287.135, F.S., for applicable sub-agreements entered into for the performance of work under this Agreement. Pursuant to Section 287.135, F.S., the Municipality may immediately terminate this Agreement if the Consultant, its affiliates, or its subcontractors are found to have submitted a false certification; or if the Consultant, its affiliates, or subcontractors are placed on any applicable scrutinized companies list or engaged in prohibited contracting activity during the term of the Agreement. As provided in Subsection 287.135(3), F.S., if federal law ceases to authorize these contracting prohibitions then they shall become inoperative.

22. PUBLIC RECORDS

Pursuant to section 119.071, Florida Statutes, Consultant shall comply with Florida's Public Records Act, Chapter 119, Florida Statutes, and agrees to:

- A. Keep and maintain all public records that ordinarily and necessarily would be required by Municipality to keep and maintain in order to perform Services under this Agreement.
- B. Upon request from Municipality's custodian of public records, provide copies to Municipality within a reasonable time and public access to said public records on the same terms and conditions that Municipality would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.

- C. Ensure that said public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
- D. Meet all requirements for retaining said public records and transfer, at no cost, to Municipality all said public records in possession of Consultant upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from Chapter 119, Florida Statutes, disclosure requirements. All records stored electronically must be provided to Municipality in a format that is compatible with the information technology systems of Municipality.
- E. **IF CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS, CHRISTINE HALLORAN, LOCATED AT CITY HALL 10 N GROVE STREET, EUSTIS, FL 32726, AT PHONE: (352) 483-5430 OR EMAIL: CITYCLERK@EUSTIS.ORG.**

23. GOVERNING LAW AND VENUE

The negotiation and interpretation of this Agreement shall be construed under and governed by the laws of the State of Florida, without regards to its choice of laws provisions. Exclusive venue for any action under this Agreement, other than an action solely for equitable relief, shall be in the state and federal courts serving Lake County and each party waives any and all jurisdictional and other objections to such exclusive venue.

24. COUNTERPARTS

This Agreement and any amendments may be executed in one or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same instrument. For purposes of executing this Agreement, scanned signatures shall be as valid as the original.

25. ELECTRONIC REPRESENTATIONS AND RECORDS

Parties hereby agree to regard electronic representations of original signatures as legally sufficient for executing this Agreement and scanned signatures emailed by PDF or otherwise shall be as valid as the original. Parties agree not to deny the legal effect or enforceability of the Agreement solely because it is in electronic form or because an electronic record was used in its formation. Parties agree not to object to the admissibility of the Agreement in the form of an electronic record, or a paper copy of an electronic document, or a paper copy of a document bearing an electronic signature, on the ground that it is an electronic record or electronic signature or that it is not in its original form or is not an original.

26. ENTIRE AGREEMENT

This Agreement, along with attached exhibits, constitutes the complete, entire and final agreement of the Parties hereto with respect to the subject matter hereof, and shall supersede any and all previous communications, representations, whether oral or written, with respect to the subject matter hereof. Invalidation of any of the provisions of this Agreement or any paragraph sentence, clause, phrase, or word herein or the application thereof in any given circumstance shall not affect the validity of any other provision of this Agreement.

IN WITNESS HEREOF, the undersigned have caused this Agreement to be executed in their respective names on the dates hereinafter enumerated.

M.T. CAUSLEY, LLC

CITY OF EUSTIS

By:  _____

By: _____

Name: Matthew K. Causley

Name: _____

Title: President

Title: _____

Date: March 22, 2023

Date: _____

EXHIBIT A

AMENDMENT ONE PROFESSIONAL SERVICES AGREEMENT BETWEEN THE TOWN OF ASTATULA AND M.T. CAUSLEY, LLC

This First Amendment to the Professional Services effective March 24, 2020, between the Town of Astatula, a Florida municipal corporation (Municipality) and M.T. Causley, LLC (Consultant). Municipality and Consultant shall be jointly referred to as the "Parties".

This Amendment shall be effective on the latest date fully executed by both Parties.

RECITALS AND REPRESENTATIONS

WHEREAS, Municipality and Consultant entered into a Professional Services Agreement (Agreement), by which both Parties established the terms and conditions for Building Inspection Services for the period of March 24, 2020 through March 23, 2021, subsequently automatically renewed for twelve (12) month terms; and

WHEREAS, the Agreement provides for a mutual annual increase based on the Consumer Price Index (United States City Average, All Items (CPI-U), Not Seasonally adjusted, All Urban Consumers, referred to herein as the "CPI") not to exceed 4% per annum; and

WHEREAS, Parties hereto now desire to amend the Fee Schedule for Services.

NOW, THEREFORE, in consideration of the mutual promises and covenants herein contained, and other good and valuable consideration, the receipt and adequacy of which are acknowledged, the Parties agree as follows:

1. The above recitals are acknowledged as true and correct and are incorporated herein.
2. Effective March 24, 2023, Municipality shall compensate Consultant for services rendered based on the revised Fee Schedule for Services hereto incorporated as Exhibit A.
3. All other conditions and terms of the original Agreement not specifically amended herein, shall remain in full force and effect.

IN WITNESS HEREOF, the undersigned have caused this Amendment to be executed in their respective names on the dates hereinafter enumerated.

M.T. CAUSLEY, LLC

TOWN OF ASTATULA

By: 

Name: Matthew K. Causley

Title: President

Date: January 11, 2023

By: 

Name: Mitchell Wade

Title: Mayor

Date: 2/23/2023

EXHIBIT A
REVISED FEE SCHEDULE FOR SERVICES
Effective March 24, 2023

Services	Original Hourly Rate	Revised Hourly Rate*
Building Official: – Residential and Commercial Inspection (all Trades) – Residential and Commercial Plan Review (all Trades) – Flood Plain Management	\$105.00 per hour—two (2) hour minimum	\$109.00 per hour - two (2) hour minimum
– CommunityCore Permitting Software	No cost	No cost
Additional Staff - as requested by the Town		
Residential and Commercial Inspection Services – Includes Building, Electrical, Plumbing and Mechanical	\$95.00 per hour - two (2) hour minimum	\$100.00 per hour - two (2) hour minimum
Residential and Commercial Plan Review Services – Includes Building, Electrical, Plumbing and Mechanical	\$95.00 per hour - two (2) hour minimum	\$100.00 per hour - two (2) hour minimum
Fire Plan Review and Inspection Services	\$105.00 per hour - two (2) hour minimum	\$109.00 per hour - two (2) hour minimum
Weekend/After Hours/Emergency Inspection Services	\$210.50 per hour - two (2) hour minimum	\$218.00 per hour - two (2) hour minimum
Time tracked will start when staff checks in at the Town or first inspection site.		

*Increased based on [CPI for All Urban Consumers \(CPI-U\): U.S. City Average](#) of 7.1% last twelve months as of November 2022.

**PROFESSIONAL SERVICES AGREEMENT
BETWEEN TOWN OF ASTATULA
AND M.T. CAUSLEY, LLC – A SAFE BUILT COMPANY**

This Professional Services Agreement (“Agreement”) is made and entered into by and between Town of Astatula (“Municipality”) and M.T. Causley, LLC, a Florida limited liability company, (“Consultant”). Municipality and Consultant shall be jointly referred to as “Parties”.

RECITALS

WHEREAS, on January 29, 2020, Municipality issued Request for Proposal for Building Inspection Services (“RFP”); and

WHEREAS, on February 10, 2020, a recommendation was made to the Town Council regarding the top ranked Firm, approving the award of the RFP to Consultant; and

WHEREAS, Municipality desires to retain Consultant to perform Building Inspection Services; and

WHEREAS, Consultant is ready, willing, and able to perform Services.

NOW THEREFORE, for good and valuable consideration, the sufficiency of which is hereby acknowledged, Municipality and Consultant agree as follows:

1. SCOPE OF SERVICES

Consultant was selected pursuant to RFP for Building Inspection Services. To the extent of inconsistencies with this Agreement or the RFP, the terms and conditions in the RFP shall prevail.

Consultant will perform Services in accordance with codes, amendments and ordinances adopted by the elected body of Municipality. The qualified professionals employed by Consultant will maintain current certifications, certificates, licenses as required for Services that they provide to Municipality in accordance with State of Florida, Chapter 468, Florida Statutes. Consultant is not obligated to perform services beyond what is contemplated by this Agreement.

Unless otherwise provided in Exhibit C, Consultant shall provide the Services using hardware and Consultant’s standard software package. In the event that Municipality requires that consultant utilize hardware or software specified by or provided by Municipality, Municipality shall provide the information specified in Exhibit C. Consultant shall use reasonable commercial efforts to comply with the requirements of Exhibit C and Municipality, at its sole expense, shall provide such technical support, equipment or other facilities as Consultant may reasonably request to permit Consultant to comply with the requirements of Exhibit C.

2. CHANGES TO SCOPE OF SERVICES

Any changes to Services between Municipality and Consultant shall be made in writing that shall specifically designate changes in Service levels and compensation for Services. Both Parties shall determine a mutually agreed upon solution to alter services levels and a transitional timeframe that is mutually beneficial to both Parties. No changes shall be binding absent a written Agreement or Amendment executed by both Parties.

3. FEE STRUCTURE

In consideration of Consultant providing services, Municipality shall pay Consultant for Services performed in accordance with Exhibit B – Fee Schedule for Services.

4. INVOICE & PAYMENT STRUCTURE

Consultant will invoice Municipality on a monthly basis and provide all necessary supporting documentation. All payments are due to Consultant within 30 days of Consultant's invoice date. Payments owed to Consultant but not made within sixty (60) days of invoice date shall bear simple interest at the rate of one and one-half percent (1.5%) per month. If payment is not received within ninety (90) days of invoice date, Services will be discontinued until all invoices and interest are paid in full. Municipality may request, and Consultant shall provide, additional information before approving the invoice. When additional information is requested Municipality will identify specific disputed item(s) and give specific reasons for any request. Undisputed portions of any invoice shall be due within 30 days of Consultants invoice date, if additional information is requested, Municipality will submit payment within thirty (30) days of resolution of the dispute.

5. TERM

This Agreement shall be effective on the latest date on which this Agreement is fully executed by both Parties. The initial term of this Agreement shall be twelve (12) months, subsequently, Agreement shall automatically renew for twelve (12) month terms; unless prior notification is delivered to either Party thirty (30) days in advance of the renewal date of this Agreement. In the absence of written documentation, this Agreement will continue in force until such time as either Party notifies the other of their desire to terminate this Agreement.

6. TERMINATION

Either Party may terminate this Agreement, or any part of this Agreement upon ninety (90) days written notice, with or without cause and with no penalty or additional cost beyond the rates stated in this Agreement. In case of such termination, Consultant shall be entitled to receive payment for work completed and approved by Municipality up to and including the date of termination

All structures that have been permitted, a fee collected, and not yet expired at the time of termination may be completed through final inspection by Consultant if approved by Municipality. Consultant's obligation is met upon completion of final inspection or permit expiration, provided that the time period to reach such completion and finalization does not exceed ninety (90) days. Alternately, Municipality may exercise the option to negotiate a refund for permits where a fee has been collected but inspections have not been completed. The refund will be prorated according to percent of completed construction as determined by Consultant and mutually agreed upon by all Parties. No refund will be given for completed work.

7. FISCAL NON-APPROPRIATION CLAUSE

Financial obligations of Municipality payable after the current fiscal year are contingent upon funds for that purpose being appropriated, budgeted, and otherwise made available in accordance with the rules, regulations, and resolutions of Municipality, and other applicable law. Upon the failure to appropriate such funds, this Agreement shall be terminated.

8. MUNICIPALITY OBLIGATIONS

Municipality shall timely provide all data information, plans, specifications and other documentation reasonably required by Consultant to perform Services. Municipality grants Consultant full privilege, non-exclusive, non-transferable license to use all such materials as reasonably required to perform Service.

9. PERFORMANCE STANDARDS

Consultant shall perform the Services using that degree of care, skill, and professionalism ordinarily exercised under similar circumstances by members of the same profession practicing or performing the substantially same or similar services. Consultant represents to Municipality that Consultant retains employees that possess the skills, knowledge, and abilities to competently, timely, and professionally perform Services in accordance with this Agreement. Municipality's sole remedy and Consultant's sole obligation in the event of failure to perform Services in accordance with the terms of this Section shall be re-performance of the services by Consultant.

10. INDEPENDENT CONTRACTOR

Consultant is an independent contractor, and neither Consultant, nor any employee or agent thereof, shall be deemed for any reason to be an employee or agent of Municipality. As Consultant is an independent contractor, Municipality shall have no liability or responsibility for any direct payment of any salaries, wages, payroll taxes, or any and all other forms or types of compensation or benefits to any personnel performing services for Municipality under this Agreement. Consultant shall be solely responsible for all compensation, benefits, insurance and employment-related rights of any person providing Services hereunder during the course of or arising or accruing as a result of any employment, whether past or present, with Consultant, as well as all legal costs including attorney's fees incurred in the defense of any conflict or legal action resulting from such employment or related to the corporate amenities of such employment.

Consultant and Municipality agree that Consultant will be free to contract for similar service to be performed for other employers while under contract with Municipality. Consultant is not an agent or employee of Municipality and is not entitled to participate in any pension plan, insurance, bonus or similar benefits Municipality provides for its employees. Consultant shall determine all conditions of employment including hours, wages, working conditions, discipline, hiring and discharge or any other condition of employment. Consultant employees are not subject to the direction and control of Municipality. Any provision in this Agreement that may appear to give Municipality the right to direct Consultant as to the details of doing the work or to exercise a measure of control over the work means that Consultant will follow the direction of the Municipality as to end results of the work only.

11. ASSIGNMENT

Neither party shall assign all or part of its rights, duties, obligations, responsibilities, nor benefits set forth in this Agreement to another entity without the written approval of both Parties; consent shall not be unreasonably withheld. Notwithstanding the preceding, Consultant may assign this Agreement to its parent, subsidiaries or sister companies (Affiliates) without notice to Municipality. Consultant may subcontract any or all of the services to its Affiliates without notice to Municipality. Consultant may subcontract any or all of the services to other third parties provided that Consultant gives Municipality prior written notice of the persons or entities with which Consultant has subcontracted. Consultant remains responsible for any Affiliate's or subcontractor's performance or failure to perform. Affiliates and subcontractors will be subject to the same performance criteria expected of Consultant. Performances clauses will be included in agreements with all subcontractors to assure quality levels and agreed upon schedules are met.

12. INDEMNIFICATION

To the fullest extent permitted by law, Consultant shall defend, indemnify, and hold harmless Municipality, its elected and appointed officials, employees and volunteers and others working on behalf of Municipality, from and against any and all third-party claims, demands, suits, costs (including reasonable legal costs), expenses, and liabilities ("Claims") alleging personal injury, including bodily injury or death, and/or property damage, but only to the extent that any such Claims are caused by the negligence of Consultant or any officer, employee, representative, or agent of Consultant.

13. RESERVED.

14. INSURANCE

- A. Consultant shall procure and maintain and shall cause any subcontractor of Consultant to procure and maintain, the minimum insurance coverages listed below throughout the term of this Agreement. Such coverages shall be procured and maintained with forms and insurers acceptable to Municipality. In the case of any claims-made policy, the necessary retroactive dates and extended reporting periods shall be procured to maintain such continuous coverage.
- B. Worker's compensation insurance to cover obligations imposed by applicable law for any employee engaged in the performance of work under this Agreement, and Employer's Liability insurance with minimum limits of one million dollars (\$1,000,000) bodily injury each accident, one million dollars (\$1,000,000) bodily injury by disease – policy limit, and one million dollars (\$1,000,000) bodily injury by disease – each employee. Worker's compensation coverage in "monopolistic" states is administered by the individual state and coverage is not provided by private insurers. Individual states operate a state administered fund of workers compensation insurance which set coverage limits and rates. Monopolistic states: Ohio, North Dakota, Washington, Wyoming.
- C. Commercial general liability insurance with minimum combined single limits of one million dollars (\$1,000,000) each occurrence and two million dollars (\$2,000,000) general aggregate. The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage, personal injury (including coverage for contractual and employee acts), blanket contractual, independent Consultant's, and products. The policy shall contain a severability of interest provision and shall be endorsed to include Municipality and Municipality's officers, employees, and consultants as additional insureds.
- D. Professional liability insurance with minimum limits of one million dollars (\$1,000,000) each claim and two million dollars (\$2,000,000) general aggregate.
- E. Automobile Liability: If performance of this Agreement requires use of motor vehicles licensed for highway use, Automobile Liability Coverage is required that shall cover all owned, non-owned, and hired automobiles with a limit of not less than \$1,000,000 combined single limit each accident.
- F. Municipality shall be named as an additional insured on Consultant's insurance coverage.
- G. Prior to commencement of Services, Consultant shall submit certificates of insurance acceptable to Municipality.

15. THIRD PARTY RELIANCE

This Agreement is intended for the mutual benefit of Parties hereto and no third-party rights are intended or implied.

16. OWNERSHIP OF DOCUMENTS

Except as expressly provided in this Agreement, Municipality shall retain ownership of all work product and deliverables created by Consultant pursuant to this Agreement and all records, documents, notes, data and other materials required for or resulting from the performance of Services hereunder shall not be used by Consultant for any purpose other than the performance of Services hereunder without the express prior written consent of Municipality. All such records, documents, notes, data and other materials shall become the exclusive property of Municipality when Consultant has been compensated for the same as set forth herein, and Municipality shall thereafter retain sole and exclusive rights to receive and use such materials in such manner and for such purposes as determined by it. Notwithstanding the preceding, Consultant may use the work product, deliverables, applications, records, documents and other materials required for or resulting from the Services, all solely in anonymized form, for purposes of (i) benchmarking of Municipality's and others performance relative to that of other groups of customers served by Consultant; (ii) sales and marketing of existing and future Consultant services; (iii) monitoring Service performance and making

improvements to the Services. For the avoidance of doubt, Municipality Data will be provided to third parties only on an anonymized basis and only as part of a larger body of anonymized data. If this Agreement expires or is terminated for any reason, all records, documents, notes, data and other materials maintained or stored in Consultant's secure proprietary software pertaining to Municipality will be exported into a CSV file and become property of Municipality. Notwithstanding the preceding, Consultant shall own all rights and title to any Consultant provided software and any improvements or derivative works thereof.

Upon reasonable prior written notice, Municipality and its duly authorized representatives shall have access to any books, documents, papers and records of Consultant that are related to this Agreement for the purposes of audit or examination, other than Consultant's financial records, and may make excerpts and transcriptions of the same at the cost and expense of Municipality.

17. CONSULTANT ACCESS TO RECORDS

Parties acknowledge that Consultant requires access to Records in order for Consultant to perform its obligations under this Agreement. Accordingly, Municipality will either provide to Consultant on a daily basis such data from the Records as Consultant may reasonably request (in an agreed electronic format) or grant Consultant access to its Records and Record management systems so that Consultant may download such data. Data provided to or downloaded by Consultant pursuant to this Section shall be used by Consultant solely in accordance with the terms of this Agreement.

18. CONFIDENTIALITY

Consultant shall not disclose, directly or indirectly, any confidential information or trade secrets of Municipality without the prior written consent of Municipality or pursuant to a lawful court order directing such disclosure.

19. CONSULTANT PERSONNEL

Consultant shall employ a sufficient number of experienced and knowledgeable employees to perform Services in a timely, polite, courteous and prompt manner. Consultant shall determine appropriate staffing levels and shall promptly inform Municipality of any reasonably anticipated or known employment-related actions which may affect the performance of Services. Additional staffing resources shall be made available to Municipality when assigned employee(s) is unavailable.

20. DISCRIMINATION & ADA COMPLIANCE

Consultant will not discriminate against any employee or applicant for employment because of race, color, religion, age, sex, disability, national origin or any other category protected by applicable federal or state law. Such action shall include but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Consultant agrees to post in conspicuous places, available to employees and applicants for employment, notice to be provided by an agency of the federal government, setting forth the provisions of Equal Opportunity laws. Consultant shall comply with the appropriate provisions of the Americans with Disabilities Act (the "ADA"), as enacted and as from time to time amended, and any other applicable federal regulations. A signed certificate confirming compliance with the ADA may be requested by Municipality at any time during the term of this Agreement.

21. PROHIBITION AGAINST EMPLOYING ILLEGAL ALIENS

Consultant is registered with and is authorized to use and uses the federal work authorization program commonly known as E-Verify. Consultant shall not knowingly employ or contract with an illegal alien to perform work under this Agreement and will verify immigration status to confirm employment eligibility. Consultant shall not enter into an agreement with a subcontractor that fails to certify to Consultant that the subcontractor shall not knowingly employ or contract with an illegal alien to perform work under this

Agreement. Consultant is prohibited from using the E-Verify program procedures to undertake pre-employment screening of job applicants while this Agreement is being performed.

22. SOLICITATION/HIRING OF CONSULTANT'S EMPLOYEES

During the term of this Agreement and for one year thereafter, Municipality shall not solicit, recruit or hire, or attempt to solicit, recruit or hire, any employee or former employee of Consultant who provided services to Municipality pursuant to this Agreement ("Service Providers"), or who interacted with Municipality in connection with the provision of such services (including but not limited to supervisors or managers of Service Providers, customer relations personnel, accounting personnel, and other support personnel of Consultant). Parties agree that this provision is reasonable and necessary in order to preserve and protect Consultant's trade secrets and other confidential information, its investment in the training of its employees, the stability of its workforce, and its ability to provide competitive building department programs in this market. If any provision of this section is found by a court or arbitrator to be overly broad, unreasonable in scope or otherwise unenforceable, Parties agree that such court or arbitrator shall modify such provision to the minimum extent necessary to render this section enforceable. In the event that Municipality hires any such employee during the specified period, Municipality shall pay to Consultant a placement fee equal to 25% of the employee's annual salary including bonus.

23. NOTICES

Any notice under this Agreement shall be in writing and shall be deemed sufficient when presented in person, or sent, pre-paid, first class United States Mail, or delivered by electronic mail to the following addresses:

If to Municipality:	If to Consultant:
Graham Wells, CMC Town Clerk, Finance Officer 25009 CR 561, P.O. Box 609, Astatula, FL 34705	Tom Walsh, Account Manager M.T. Causley, LLC 18001 Gulf Blvd Redington Shores, FL 33708 Mike Causley 866 Ponce de Leon Blvd., 2nd Floor Coral Gables, FL 33134

24. FORCE MAJEURE

Any delay or nonperformance of any provision of this Agreement by either Party (with the exception of payment obligations) which is caused by events beyond the reasonable control of such party, shall not constitute a breach of this Agreement, and the time for performance of such provision, if any, shall be deemed to be extended for a period equal to the duration of the conditions preventing such performance.

25. DISPUTE RESOLUTION

In the event a dispute arises out of or relates to this Agreement, or the breach thereof, and if said dispute cannot be settled through negotiation, Parties agree first to try in good faith to settle the dispute by mediation, before resorting to arbitration, litigation, or some other dispute resolution procedure. The cost thereof shall be borne equally by each Party.

26. ATTORNEY'S FEES

In the event of dispute resolution or litigation to enforce any of the terms herein, each Party shall pay all its own costs and attorney's fees.

27. AUTHORITY TO EXECUTE

The person or persons executing this Agreement represent and warrant that they are fully authorized to sign and so execute this Agreement and to bind their respective entities to the performance of its obligations hereunder.

28. CONFLICT OF INTEREST AND ETHICS REQUIREMENTS

This Agreement is subject to State of Florida Code of Ethics. Agreement may be subject to Lake County Code of Ethics and investigation and/or audit by the Lake County Inspector General. Accordingly, there are prohibitions and limitation on the employment of Municipal officials and employees and contractual relationships providing a benefit to the same.

29. PUBLIC RECORDS

Pursuant to section 119.071, Florida Statutes, Consultant shall comply with Florida's Public Records Act, Chapter 119, Florida Statutes, and agrees to:

- A. Keep and maintain all public records that ordinarily and necessarily would be required by Municipality to keep and maintain in order to perform Services under this Agreement.
- B. Upon request from Municipality's custodian of public records, provide copies to Municipality within a reasonable time and public access to said public records on the same terms and conditions that Municipality would provide the records and at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.
- C. Ensure that said public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law.
- D. Meet all requirements for retaining said public records and transfer, at no cost, to Municipality all said public records in possession of Consultant upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from Chapter 119, Florida Statutes, disclosure requirements. All records stored electronically must be provided to Municipality in a format that is compatible with the information technology systems of Municipality.

E. IF CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

Clerk Office: Graham Wells Address: 25019 County Rd 561, Astatula, FL 34705	Phone: (352) 742-1100 Email: gwells@astatula.org
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30. GOVERNING LAW AND VENUE

This Agreement shall be construed under and governed by the laws of the State of Florida and all services to be provided will be provided in accordance with applicable federal, state and local law, without regard to its conflict of laws provisions.

31. COUNTERPARTS

This Agreement and any amendments may be executed in one or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same instrument. For purposes of executing this Agreement, scanned signatures shall be as valid as the original.

32. ELECTRONIC REPRESENTATIONS AND RECORDS

Parties hereby agree to regard electronic representations of original signatures as legally sufficient for executing this Agreement and scanned signatures emailed by PDF or otherwise shall be as valid as the

original. Parties agree not to deny the legal effect or enforceability of the Agreement solely because it is in electronic form or because an electronic record was used in its formation. Parties agree not to object to the admissibility of the Agreement in the form of an electronic record, or a paper copy of an electronic document, or a paper copy of a document bearing an electronic signature, on the ground that it is an electronic record or electronic signature or that it is not in its original form or is not an original.

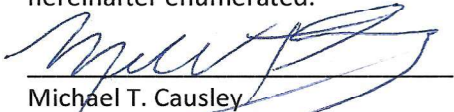
33. WAIVER

Failure to enforce any provision of this Agreement shall not be deemed a waiver of that provision. Waiver of any right or power arising out of this Agreement shall not be deemed waiver of any other right or power.

34. ENTIRE AGREEMENT

This Agreement, along with attached exhibits, constitutes the complete, entire and final agreement of the Parties hereto with respect to the subject matter hereof, and shall supersede any and all previous communications, representations, whether oral or written, with respect to the subject matter hereof. Invalidity of any of the provisions of this Agreement or any paragraph sentence, clause, phrase, or word herein or the application thereof in any given circumstance shall not affect the validity of any other provision of this Agreement.

The undersigned have caused this Agreement to be executed in their respective names on the dates hereinafter enumerated.



Michael T. Causley
M.T. Causley, LLC – A SAFEbuilt Company

3/24/2020

Date



Signature

3/9/2020

Date

Mitchell Mack, Mayor
Town of Astatula

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EXHIBIT A – LIST OF SERVICES

1. LIST OF SERVICES

Building Official Services

- ✓ Manage and help administer the department and report to Municipality's designated official
- ✓ Be a resource for Consultant team members, Municipal staff, and applicants
- ✓ Help guide citizens through the complexities of the codes in order to obtain compliance
- ✓ Monitor changes to the codes including state or local requirements and determine how they may impact projects in the area and make recommendations regarding local amendments
- ✓ Assist Municipal staff in revising and updating municipal code to comply with adopted requirements
- ✓ Provide Building Code interpretations for final approval
- ✓ Oversee our quality assurance program and will make sure that we are meeting our agreed upon performance measurements and your expectations
- ✓ Provide training for our inspectors on Municipality adopted codes and local amendments as needed
- ✓ Oversee certificate of occupancy issuance to prevent issuance without compliance of all departments
- ✓ Attend staff and council meetings as mutually agreed upon
- ✓ Responsible for reporting for Municipality – frequency and content to be mutually agreed upon
- ✓ Responsible for client and applicant satisfaction
- ✓ Work with Municipal staff to establish and/or refine building department processes
- ✓ Issue stop-work notices for non-conforming activities – as needed

Building, Electrical, Plumbing, and Mechanical Inspection Services

- ✓ Consultant utilizes an educational, informative approach to improve the customer's experience.
- ✓ Perform code compliant inspections to determine that construction complies with approved plans
- ✓ Meet or exceed agreed upon performance metrics regarding inspections
- ✓ Provide onsite inspection consultations to citizens and contractors while performing inspections
- ✓ Return calls and emails from permit holders in reference to code and inspection concerns
- ✓ Identify and document any areas of non-compliance
- ✓ Leave a copy of the inspection ticket and discuss inspection results with site personnel

Plan Review Services

- ✓ Provide plan review services electronically or in the traditional paper format
- ✓ Review plans for compliance with adopted building codes, local amendments or ordinances
- ✓ Be available for pre-submittal meetings by appointment
- ✓ Coordinate plan review tracking, reporting, and interaction with applicable departments
- ✓ Provide feedback to keep plan review process on schedule
- ✓ Communicate plan review findings and recommendations in writing
- ✓ Return a set of finalized plans and all supporting documentation
- ✓ Provide review of plan revisions and remain available to applicant after the review is complete

2. COMMUNITY CORE SYSTEMS TERMS AND CONDITIONS

- ✓ Provide Community Core in accordance with the terms, and conditions of Exhibit C.

3. MUNICIPAL OBLIGATIONS

- ✓ Municipality will issue permits and collect all fees
- ✓ Municipality will provide Consultant with a list of requested inspections and supporting documents
- ✓ Municipality will intake plans and related documents
- ✓ Municipality will provide a monthly activity report that will be used for monthly invoicing

- ✓ Municipality will provide zoning administration for projects assigned to Consultant
- ✓ Municipality will provide codes books for front counter use
- ✓ Municipality will provide office space, desk, desk chairs, file cabinets, local phone service, internet, use of copier and fax

4. TIME OF PERFORMANCE

Services will be performed during normal business hours excluding Municipal holidays.

- ✓ Services will be performed two (2) days a week, two (2) hours per day minimum
- ✓ Building Official will be on-site at the Municipal offices as mutually agreed upon
- ✓ Inspectors will be dispatched on an as-needed basis
- ✓ Consultants representative(s) will be on-site weekly based on activity levels
- ✓ Consultants representative(s) will be available by cell phone and email
- ✓ Consultants representative(s) will meet with the public by appointment
- ✓ Additional Inspectors will be dispatched on an as-needed basis

Deliverables			
INSPECTION SERVICES	Perform inspections received from the Municipality prior to 4:00 pm next business day		
TWO HOUR INSPECTION WINDOW	Provide a two-hour window of time that the permit holder can expect to have their inspection performed – Upon request only		
MOBILE RESULTING	Provide our inspectors with field devices to enter results immediately		
PRE-SUBMITTAL MEETINGS	Provide pre-submittal meetings to applicants by appointment		
PLAN REVIEW TURNAROUND TIMES	Provide comments within the following timeframes: Day 1 = first full business day after receipt of plans and all supporting documents		
	<u>Project Type:</u>	<u>First Comments</u>	<u>Second Comments</u>
	<ul style="list-style-type: none"> ✓ Single-family within ✓ Multi-family within ✓ Small commercial within (under \$2M in valuation) ✓ Large commercial within 	5 business days 10 business days 10 business days 20 business days	5 business days or less 5 business days or less 5 business days or less 10 business days or less
APPLICANT SATISFACTION	Put a survey in place that allows applicants to provide feedback on their experience throughout the process		

EXHIBIT B – FEE SCHEDULE FOR SERVICES

FEE SCHEDULE

- Consultant shall provide notice to Municipality 60 days prior to renewal date of proposed hourly rate increase to be reviewed and approved by Town Council. Parties will collaborate to ensure a mutually beneficial arrangement. If increase is approved by Town Council, it shall be based upon the annual increase in the Department of Labor, Bureau of Labor Statistics or successor thereof, Consumer Price Index (United States City Average, All Items (CPI-U), Not Seasonally adjusted, All Urban Consumers, referred to herein as the “CPI”) for the Municipality or, if not reported for the Municipality the CPI for cities of a similar size within the applicable region from the previous calendar year, such increase, however, not to exceed 4% per annum.
- Consultant fees for Services provided pursuant to this Agreement will be as follows:

Services	Hourly Rate
Building Official: – Residential and Commercial Inspection (all Trades) – Residential and Commercial Plan Review (all Trades) – Flood Plain Management	\$105.00 per hour—two (2) hour minimum
– CommunityCore Permitting Software	No cost
Additional Staff - as requested by the Town	
Residential and Commercial Inspection Services – Includes Building, Electrical, Plumbing and Mechanical	\$95.00 per hour - two (2) hour minimum
Residential and Commercial Plan Review Services – Includes Building, Electrical, Plumbing and Mechanical	\$95.00 per hour - two (2) hour minimum
Fire Plan Review and Inspection Services	\$105.00 per hour - two (2) hour minimum
Weekend/After Hours/Emergency Inspection Services	\$210.50 per hour - two (2) hour minimum
Time tracked will start when staff checks in at the Town or first inspection site.	

EXHIBIT C – COMMON CORE

1. Consultant is able to provide Services pursuant to this Agreement using hardware and Consultant's standard software package, CommonCore. In the event that Municipality requires that Consultant utilize hardware and/or software specified by and provided by Municipality, Consultant shall use reasonable commercial efforts to comply with Municipal requirements.
2. When Municipality requires that Consultant utilize hardware and/or software specified by and provided by Municipality, Municipality, at its sole expense, shall provide such technical support, equipment or other facilities as Consultant may reasonably request to permit Consultant to comply with Municipal requirements.

Municipality will provide the following information to Consultant.

- ✓ Municipal technology point of contact information including name, title, email and phone number
- ✓ List of technology services, devices and software that the Municipality will provide may include:
 - Client network access
 - Internet access
 - Proprietary or commercial software and access
 - Computer workstations/laptops
 - Mobile devices
 - Printers/printing services
 - Data access
 - List of reports and outputs



**REQUEST FOR PROPOSALS
TOWN OF ASTATULA, FLORIDA
FOR
BUILDING INSPECTION SERVICES PROVIDERS**

I Background

The Town of Astatula, Florida, (the "Town") is located in Central Lake County, Florida.

II Qualification of Applicants

Proposals will be considered from qualified firms whose experience includes successful work in the industry. Applicants should submit one (1) original and four (4) copies plus one (1) electronic copy and respond to each of the following items as clearly as possible.

1. A brief but complete history of your company.
2. Anticipated approach and scope to provide the proposed services.
3. Completed Conflict of Interest Disclosure Form.
4. Work histories of key personnel who will actually be assigned to the provision of services and describing their role.
5. Proof of Insurance.
6. A list of similar services provided in Florida including the following information:
 - a. Name of the entity for which the work was performed.
 - b. Brief description of the scope of the work
 - c. Name of contact person with the entity and current telephone number who can knowledgeably discuss your firm's role and performance in the project.
7. Any other information the firm feels is relevant to evaluating the firm's qualifications.

III. Submission Requirements

1. One (1) original, four (4) copies, and one (1) thumb drive containing the electronic copy of the submittals should be hand delivered or mailed and received by the Town no later than 3:00 pm on February 6, 2020 to:

**Graham Wells
Town Clerk
P.O. Box 609
25009 CR 561, Astatula, FL 34705**

The outside of the envelope shall be clearly marked "RFP Building Services".

2. Describe the Firm's understanding of the scope of services and the Town's needs; specialized skills that are available from the Firm; special considerations; and possible difficulties in completing the project as described.
3. Provide a schedule of how the Firm will implement and set up the operations of a part time Plans Reviewer and Building Inspector for the Town.
4. The proposal shall include a sample of the forms that will be used in the performance of the job, and the required forms in Section IX, below.
5. Failure to include any of the items in this section may result in the submittal being deemed non-responsive.
6. A statement that no member of the Firm is currently under investigation by any governmental authority for conspiracy or collusion with respect to bidding on any public contract.
7. All information submitted by a Firm will become part of the project file and, unless otherwise exempt or confidential in accordance with Florida law, will become a public record.

IV. Evaluation Procedures

The submittal information will be reviewed and ranked by the Town Clerk based on the following:

1. Qualifications and experience of Firm/Personnel
2. Scope Response/Approach to the Project
3. Fee Proposal

V. Selection Process

1. The Town Clerk will review the submittal packages and will make a selection and recommendation to the Town Council regarding the top ranked Firm at the February 10, 2020 Town Council meeting. A representative(s) from Firm should be present at the Town Council meeting to address the Town Council and answer questions (if any) regarding the services.
2. The Town has the sole discretion and reserves the right to cancel this RFP at any time prior to executing a contract, to reject any and all submittals, to waive any and all informalities and/or irregularities, or to re-advertise with either the identical or revised scope of services, if it is deemed to be in the best interest of the Town to do so.
3. The Town reserves the right to make a contract award to the response deemed to be most advantageous to the Town.

VI. Enquiries

Questions regarding this Request for Proposal shall be directed to

**Graham Wells
Town Clerk
P.O. Box 609
25009 CR 561, Astatula, FL 34705
(352) 742-1100 option 1**

Members of the Firm shall not contact, communicate with, or discuss any matter relating in any way to this RFP with any member of the Town Council or employee of the Town other than the Town Clerk. Such communication may result in disqualification from consideration for award of this RFP.

VII. Insurance Requirements

- A. The selected Firm shall not commence work under any agreement until it has obtained all insurance coverage required under this section and the Town has received and approved the copies of such Certificates of Insurance.
- B. All insurance shall be issued by companies authorized to do business under the Laws of the State of Florida, and which are acceptable to the Town. The Firm shall furnish and maintain Certificates of Insurance to the Town prior to the commencement of any work.
- C. The Certificates shall clearly indicate that the Firm has obtained coverage of the type and amount and classification as required for strict compliance with this section and no material change or cancellation of insurance shall be without thirty (30) days prior notice to the Town. Compliance with the foregoing requirements shall not relieve the firm of its liability and obligation under the contract for services.
- D. Coverage shall be as follows:
 - 1. **Workers Compensation;** Coverage shall meet all the requirements of Chapter 440, Florida Statutes, but at a minimum shall meet the specific requirements of the Town.
 - 2. **Comprehensive General Liability;** The limits shall be not less than \$1,000,000 Combined Single Limit or its equivalent.
 - 3. **Comprehensive Automobile Liability;** The Firm shall provide complete coverage for owned and non-owned vehicles for limits not less than \$1,000,000 combined Single Limit or its equivalent.
 - 4. **Professional/Errors and Omissions Liability;** The Firm shall carry Professional/Errors and Omissions Liability Insurance in a minimum amount of \$1,000,000 combined Single Limit or its equivalent.

All insurance other than Worker's Compensation to be maintained by the Firm shall specifically include the Town as an additional insured.

VIII. Scope of Services

1. The selected Firm shall provide a Licensed Building Official and other inspection and plan review staff as required to meet the needs of the Town. All license holders must possess valid licenses that are in good standing with the Department of Business and Professional Regulation
2. All inspection and plan review staff must possess licenses for the trade in which they inspect per Chapter 468 and all other applicable sections of the Florida Statutes.
3. The successful Firm shall provide the following services:
 - a. The Firm must provide inspection services by licensed staff.
 - b. The Firm shall provide all salaries, wages and compensation for their employees.
 - c. The Firm shall provide full field communication equipment for their employees with a minimum of a cellular phone per inspector. The Town shall be provided with the cellular phone number of each inspector. The inspectors must respond to the Town's calls.
 - d. The Firm must provide transportation for its employees.
 - e. The Firm shall provide monthly and quarterly reports to the Town regarding activities related to permitting, in the form required by the Town Clerk.
 - f. The Firm shall provide the services of the Building Official, Plan Review, and Inspectors during normal Town business hours.
 - g. The Firm shall assist with building code enforcement as requested by the Town.
 - h. The Firm shall provide the Town with inspections and services for which no permit fee is required. The services and inspections shall be at the direction of the Town and will be invoiced to the Town based on a set hourly fee.

IX. Required Forms

- a. Drug Free Workplace Form
- b. Conflict of Interest Statement

DRUG-FREE WORKPLACE POLICY STATEMENT

The undersigned Firm, in accordance with Florida Statute 287.087 hereby certifies that _____ Does:

(Name of Business)

- A. Publish a statement notifying all employees that it is a condition of employment to refrain from using, possessing or otherwise dealing in drugs on or off the job and specifying the actions that will be taken against employees for violations.
- B. Inform employees of the dangers of drug abuse in the workplace, the business policy of maintaining a drug-free workplace, and available drug counseling, rehabilitation and employee assistance programs and the penalties that may be imposed on employees for drug abuse violations.
- C. A notice of drug testing is included with all vacancy announcements for all positions and drug testing is required as part of the employment process. A notice of the firm's drug testing policy is also posted in an appropriate and conspicuous location on the business's premises and copies of the policies will be made available for inspection during regular business hours by the general public or the Town.

As the person authorized to sign the statement, I certify that this firm complies with the above requirements.

(Signature)

(Print Name)

Date

Town of Astatula, Florida
Request for Proposals

Must be included in submittal

CONFLICT OF INTEREST DISCLOSURE STATEMENT

I, _____ am _____
(Print Name) (Print Title)
and the duly authorized representative of the firm _____
(Print Name of Company)
whose address is:

I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting; and

Except as listed below, no employee, officer, or agent of the firm have any conflict of interest, real or apparent, due to ownership, other clients, or interest associated with this project; and

This proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same services, and is in all respects fair and without collusion of fraud.

EXCEPTIONS: (list)

Signature

Print Name

Name of Company

Date: _____

STATE OF FLORIDA
COUNTY OF _____

THE FOREGOING INSTRUMENT was acknowledged before me by means of ☒ physical presence or ☐ online notarization, this ____ day of _____, 20__, by _____, who ☐ is personally known to me, or ☐ produced _____ as identification.

[AFFIX NOTARY SEAL]

Notary Public Signature

Print Notary Name: _____

My commission expires: _____



Request for Proposals

Building Inspection Services

ELECTRONIC



Town of Astatula
February 6, 2020 | 3:00 PM

Tom Walsh

Regional Operations Manager
407.615.1964
TWalsh@safebuilt.com

M.T. Causley, LLC
18001 Gulf Blvd
Redington Shores, FL 33708





FL

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Town of
Astatula
"Lake of Sunbeams"

Town Hall
Police Department
Community Center

Fall Festival
10-26-2013 @ 3:00

OPTEC

25009

TAB 1

LETTER OF INTEREST

February 4, 2020

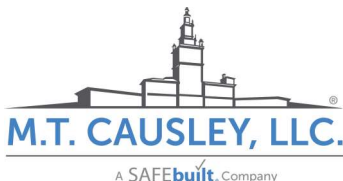
Town of Astatula
C/O Graham Wells, Town Clerk
25009 CR 561
Astatula, FL 34705

Re: RFP Building Inspection Services Providers

Please accept M.T. Causley, LLC - A SAFEbuilt Company's (M.T. Causley) formal response to the Town of Astatula's (the Town) request for *Building Inspection Services*. We are excited for the opportunity to assist the Town with Building Official, Plans Review and Inspection Services. Our team has reviewed the Request for Proposal (RFP) carefully, and we fully understand the Town's requirements. Services will be provided through our satellite office located in Orlando, Florida.

Since 1996, we have been dedicated to exclusively providing Building Official Services throughout Florida. In 2016, we merged with SAFEbuilt, Inc. And in 2018, SAFEbuilt acquired another well respected, multi-service firm: Calvin, Giordano & Associates, Inc. Combining the strengths of all three companies, we are able to offer our clients a wider range of services across the nation. **No member of M.T. Causley, Calvin, Giordano & Associates nor SAFEbuilt is currently under investigation by any governmental authority for conspiracy or collusion with respect to bidding on any public contract.**

We have partnered with more than eighty (80) municipalities in various capacities: helping them to be safer, develop responsibly, and improve service to local citizens. Our success is reflected on understanding the unique needs of each municipality, tailoring our services based on those needs and then provide a solid team of well-qualified and experienced professionals to meet the goals and objectives of the community. For that reason, we have assembled a team of professionals who reside and work near the Town to guarantee responsive, attentive service. This team consist of multi-licensed Building Officials, Inspectors and Plan Examiners, licensed in all trades and by the Department of Business & Professional Regulations.



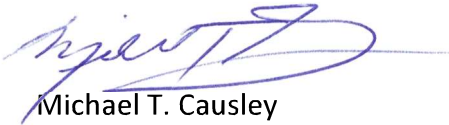
(cont'd)

The designated team will be supervised by our Project Manager, Tom Walsh. He works directly with neighboring cities making sure services are delivered at an optimal level. He allocates staff based on the needs of each city and works diligently with decision makers ensuring they have the required services to keep their communities safe.

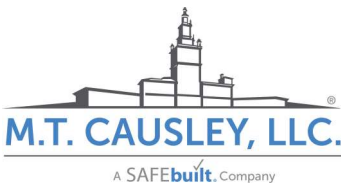
Throughout our response, we aim to differentiate ourselves as the only company that can provide the highest quality services and most enhanced value to the Town - not only through our experience, but also through dedication to customer service and flexibility to adapt to fluctuating workloads.

We understand the commitment staff has in delivering services to Town residents, and we will commit to operate as an extension of this high-quality service. Thank you for your time and consideration in reviewing our qualifications. If you have any questions during evaluation, please feel free to contact Tom Walsh at 407.615.1964 or TWalsh@safebuilt.com

Best Regards,



Michael T. Causley
President





TAB 2

HISTORY OF COMPANY

Firm History

M.T. Causley was established in 1996 in Florida. Since then, our sole purpose was and continues to be to provide building department services to local governments. We have dedicated our resources to exceeding the expectations of clients and we are committed to providing excellent customer service. As a pioneer of the industry, we have proven our competence by successfully assisting over eighty (80) cities and counties with the specific work that the City requires.

M.T. Causley is a respected name within the Florida community and has been providing exceptional Building Official, Plan Review and Inspection Services to cities, such as the City of Lakeland, for the past 23 years. With over 120 Building Officials, Inspectors, Plans Examiners, permitting staff, and administrative staff currently employed, our Team's experience is extensive. In 2016, we merged with SAFEbuilt LLC. And in 2018, SAFEbuilt acquired another well respected, multi-service firm: Calvin, Giordano & Associates. Combining the strengths of all three companies, we are able to offer our clients a wider range of services across the nation.

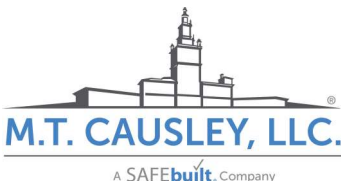
To stay current with the latest code changes, the professional team completes a minimum of sixteen (16) hours of continuing education every year. Some staff members have obtained Bachelor's degree in construction management and others have further advanced their studies by obtaining their Master's

DID YOU KNOW?

M.T. Causley:

- Has provided Building Official, Plan Review, Inspection & Permit Technician Services for the last 23 years
- Has successfully assisted more than 80 government agencies with similar services
- Has a large and diverse staff pool with over 30 different types of licenses
- Employs professionals with over twenty years of experience

degree. With more than 20 years of experience for most of the team, collectively the key personnel has over 80 years of experience providing building inspections and plan review services. Additionally, the team has completed over 200,000 inspections and plan review of new, unoccupied and occupied renovations, and expansion projects ranging from single family homes, to large residential developments, airports, healthcare facilities, high-rises, industrial, warehouses, and large commercial retail centers.





TAB 3

APPROACH TO SERVICES

Project Approach

We have assisted Florida government agencies with Building Official, Plan Review and Inspection Services through all aspects of growth: establishment, expansion, and stabilization. Throughout our twenty-three (23) years of experience providing services similar to those required in this RFP, we have been called upon to quickly upscale our staff and deliverables. Should the Town's needs grow or evolve to include additional services, we have the capability to quickly adapt to expanding needs.

Our team's approach to providing Building Official, Plan Review and Inspection Services is simple: do everything necessary to ensure a smooth integration of existing (Town) and new (M.T. Causley) resources. To do so, our staff will meet with the Town, identify designated personnel and the main point-of-contact. We will then concentrate our efforts on fulfilling the Town's immediate needs to ensure services are provided at an optimal level.

Our staff will familiarize themselves with the preferred processing methods as well as the Town's permitting software. Additionally, our staff will collaborate with the existing staff to complete any backlog plan review and inspections.



INCREASED
CUSTOMER SERVICE



CLIENT CENTERED
APPROACH



IMPROVE
COST EFFICIENCIES



DATA REPORTING
AND METRICS



INCREASE
WORKFLOW PRODUCTIVITY



ELECTRONIC PLAN REVIEW
AND EFFICIENT
FRONT COUNTER SERVICES

Personnel

We are able to provide staff year round. Our model offers real advantages to the Town by providing flexibility and a sense of security knowing that reliable expertise is always on hand, without the hassle of the staffing issues or fixed costs that come with an in-house department. As an outside firm providing services to other Florida government agencies, we are able to address such staffing issues appropriately. We have the capability to easily increase or decrease employee size through our scheduling process. Our commitment to service delivery is number one.

If an increase appears to be permanent, we simply bring in additional full time staff and ensure we have part time staff ready for the next possible surge or absence. This works for our agency, because we have no headcount restrictions, political objectives, or union issues. The Town gains access to a deep network of experienced Building Officials, Plan Examiners, trade Inspectors and more. We assume responsibility for all staffing issues. We manage the workload and hiring process, as well as provide salaries, benefits, ongoing training, and vehicles for staff.

Equipment & Supply Resources

Employees are supplied with late model vehicles with removable signage, as well as ladders, electrical test equipment, photography equipment and additional field related equipment necessary to perform their duties. Furthermore, staff is supplied with safety devices and clothing required to meet OSHA requirements. In addition to a library of current code books, laptops are also provided allowing easy access to the most current Florida Building Code.



Staff is also provided with:

- Fuel and vehicle maintenance
- Insurance
 - Liability
 - Workers Compensation
 - Health, Dental, Vision and Life
- Uniforms
- Continuing Education Courses
- Cell phones
- iPads/Laptops
- OSHA Required Safety Equipment
- Code and Reference Books
- Building Guides

We are committed to providing the Town with Building Official, Plan Review and Inspection Services. The following explains in further detail our approach to delivering each service and task.

Building Official

Robert Kegan, an experienced Building Official, will oversee compliance with State plumbing, mechanical, electrical, gas, fire prevention, energy, accessibility and building codes, as well as health, safety and welfare statutes, Unsafe Building Abatement Code, Federal Emergency Management Contractor and all ordinances. Additionally, he will administrate all plan review, inspections and enforcement. Services will be coordinated with responsible local, state, and federal agencies, departments and entities. **Jimmy Strickland** and **Raymond Schaub**, also experienced and licensed Building Officials, will support Mr. Kegan in the event he is not available.

Responsibilities include:

- Assist with the permitting process established by the Town
- Coordinate with the Department's Permit Technician
- Serve as technical advisor for the Building Department
- Issue Permits
- Acts as the liaison to the construction industry, State, contractors and the general public
- Review State Statutes affecting construction and determine impact on the Town

- Review, research and make recommendations for approval of adoption of departmental policies.

Plan Review

Plan review will be conducted at the Town's building department. Staff will review all plans, ensuring they meet the protocol established by the Florida Building Code, National Electric Code, the Building Official in addition to the adopted codes, local amendments and Florida Statute 468.603. Plan review will include building, roofing, plumbing, mechanical, electrical, gas, fire prevention, energy, and accessibility categories for single and multi-family residence, commercial, office and industrial projects.



We will be a resource to applicants on submittal requirements and be available to them throughout the process. We will work with other departments on the concurrent review process and be available for pre-submittal meetings. We are also a resource for other members of the team and will provide support as questions arise in the field from Inspectors.

Highlighted responsibilities include:

- Determination of type of construction, use, and occupancy classification and review of plans to determine compliance with applicable codes and ordinances using a state approved Plans Examiner
- Review of plans will result in recommendation of approval, approval with modifications, or denial of the plans with clear and specific written findings and observations that support the recommendations. Reviewers will upload information utilizing the Town's permit system.
- Meet or exceed agreed upon plan review turnaround times and return a set of finalized plans and all supporting documentation
- Provide ongoing support including review of all plans/plan revisions and be available to the applicant after the review is complete
- Walk-thru plans review services may be provided during designated times for minor permits.

Inspections

Our inspection staff recognizes that an educational, informative approach is the most effective way to improve the customer's experience. Staff will provide on-site consultations to citizens and contractors as part of their responsibility. Staff will perform building, mechanical (HVAC), plumbing, structural and electrical inspections of construction, alteration, repair, remodeling, or demolition of structures.

Responsibilities include:

- Perform consistent code compliant inspections to determine that construction complies with approved plans and/or applicable codes and ordinances
- Complete field inspections within twenty-four (24) hours of request
- Enter results of inspections
- Provide clear, specific and definite written final recommendations and observations regarding each inspection completed
- Discuss inspection results with site personnel



- Investigate alleged complaints received at the Town and provide written report of inspection and investigation using Town inspection forms.
- Staff can conduct change of occupancy inspections as well as investigate complaints, hazardous building inspections and assist with prosecution of building code and hazardous building violations. Staff will provide practical alternatives to bring buildings into compliance and clarify the intent of codes and ordinances.
- Speak with contractors, architects, engineers and citizens about construction projects, code questions and all other related concerns.

Implementation Schedule

Implementation will begin with the approval of the Town Commission to finalize an agreement and determine a start date. We are available to begin work immediately upon execution of the contract.

During the transition period, it is important that customer service is not compromised. The proposed transition plan will achieve those goals, as we have a complete understanding of the processes involved.

Immediately upon award of contract:

- The designated staff will begin the transition process with the existing staff. Staff will familiarize themselves with the preferred processing methods.
- Project Manager and Field Supervisor will evaluate the workload to determine staffing needs to meet the expected services.
- Project Manager and/or the Building Official will work with the Town in establishing services the Town may need to ensure the Building Department operates as efficiently and customer-service oriented as possible. For example, we can assist the Town in implementing a fee schedule that will be most beneficial to the Town and its residents.
- Agreed upon office hours will be determined to provide availability to the public and for

meetings with various Town entities.

- Staff will work with the existing Building Department staff in completing all in-process plans review and inspections.

The transition period should be completed within two (2) weeks or less. As a result of our experience in assisting cities and counties with the transition and establishment of Building Department Services, the transition should be a smooth and uneventful process.

We can assure the Town that the Building Department will be sufficiently staffed with a well-qualified team who will meet the needs of the Town.



CommonCore

CommunityCore is SAFEbuilt's proprietary online community development software tool, which manages permitting, plan reviews and approvals, and inspection activities. The system, which integrates with other government software systems, is designed to streamline and automate building department processes; ensure compliance, manage workflows, generate activity reporting, and provide transparency to all stakeholders.

Our software solution will transform the way your City conducts plan reviews. Applicants can submit plan reviews electronically and track the progress of each step, in real time, from applicant submittal through certificate of occupancy. This gives you and your clients clear insight, as well as detailed information on the status of each permit.

Our web application features fully configurable settings and encompasses a full suite of tools for community development projects.

- Permitting—Customize your permitting system to fit specific permit types, workflows, fee structures, and documents
- Planning—Manage the plan review process within your jurisdiction
- Licensing—Enable issuance, tracking, and renewal of any recurring contractor or business license
 - ⇒ GIS/County Assessor's Office Connection
 - ⇒ Robust report library
 - ⇒ Fee estimator

- ⇒ Scheduling tool
- ⇒ Fee estimator
- ⇒ Scheduling tool
- ⇒ Fee assessment, payment, and financial reporting
- ⇒ Customized workflows
- ⇒ Simple document upload tool
- ⇒ Automatic parcel lookup
- ⇒ Reporting and tracking of local contractor and business licenses

The software is supported by user-friendly mobile applications for added convenience and efficiency. Built for iOS and Android, and designed for simple integration with the system, our mobile applications give access to critical information, communicate effectively, and work efficiently.

InspectorConnect

Simplifies the process of capturing inspection results with access to critical information from a smartphone or tablet.

- ☒ Permit viewing
- ☒ Google Maps routing
- ☒ Attach photos to an inspection from your phone or tablet
- ☒ Automatic inspection results
- ☒ Voice notes tool
- ☒ Photo/document uploader
- ☒ Tap to call/email a contractor or property owner

ContractorConnect

Saves time, reduces call volume and walk-in traffic, and boosts overall productivity on any project.

- ☑ Online permit application and management
- ☑ Secure online payment
- ☑ Plan uploader
- ☑ Request and schedule inspections

Benefits of Utilizing CommunityCore Solutions

CommunityCore Solutions was created by people who use the software on a daily basis – Permit Technicians, Inspectors, and Plans Examiners. Unlike many companies in the market, we continuously invests in improvements to building department management solutions. Currently used by more than 300 municipalities, the software has proven to be a reliable and effective tool for local governments.

CommunityCore—traditionally valued at \$150,000—will be provided at no cost to you. We would include a full assessment and complete implementation, as well as project management services—migration of data from your existing system or spreadsheets. The details and scope of the data migration would be discussed as part of our implementation strategy. This process is simple, taking advantage of out-of-the-box functionality whenever possible.

	<p>TRAINING AND SUPPORT</p> <p>Meritage Systems is committed to training and support. Our team of former Building Department professionals is ready to assist in your everyday operations and challenges.</p>
	<p>PROVEN, SECURE, AND EASY-TO-USE</p> <p>With automatic back-ups and built-in redundancy, your data is secure and always accessible. Intuitive navigation makes using the software easy for those in the field and the office.</p>
	<p>MOBILE FRIENDLY</p> <p>You can access data from anywhere with a connection to the internet. Building Inspectors, Code Compliance Officers, and Contractors can use iOS and Android apps to track their work and communicate efficiently with the permitting office.</p>



TAB 4
FORMS

DRUG-FREE WORKPLACE POLICY STATEMENT

The undersigned Firm, in accordance with Florida Statute 287.087 hereby certifies that _____ Does:

(Name of Business) M.T. Caustey, LLC - A SAFE BUILT Company

- A. Publish a statement notifying all employees that it is a condition of employment to refrain from using, possessing or otherwise dealing in drugs on or off the job and specifying the actions that will be taken against employees for violations.
- B. Inform employees of the dangers of drug abuse in the workplace, the business policy of maintaining a drug-free workplace, and available drug counseling, rehabilitation and employee assistance programs and the penalties that may be imposed on employees for drug abuse violations.
- C. A notice of drug testing is included with all vacancy announcements for all positions and drug testing is required as part of the employment process. A notice of the firm's drug testing policy is also posted in an appropriate and conspicuous location on the business's premises and copies of the policies will be made available for inspection during regular business hours by the general public or the Town.

As the person authorized to sign the statement, I certify that this firm complies with the above requirements.


(Signature)

Michael T. Caustey
(Print Name)

Date Feb. 3, 2020

Town of Astatula, Florida
Request for Proposals

Must be included in submittal

CONFLICT OF INTEREST DISCLOSURE STATEMENT

I, Michael T. Caustey am President
(Print Name) (Print Title)

and the duly authorized representative of the firm M.T. Caustey, LLC - A SAFEbuilt
(Print Name of Company) Company

whose address is:

18001 GULF BLVD.
Redington Shores, FL 33708

I possess the legal authority to make this affidavit on behalf of myself and the firm for which I am acting; and

Except as listed below, no employee, officer, or agent of the firm have any conflict of interest, real or apparent, due to ownership, other clients, or interest associated with this project; and

This proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same services, and is in all respects fair and without collusion of fraud.

EXCEPTIONS: (list)

Signature [Signature]
Print Name Michael T. Caustey
Name of Company M.T. Caustey, LLC - A SAFEbuilt Comp.
Date: Feb. 3, 2020

STATE OF FLORIDA
COUNTY OF MIAMI-DADE

THE FOREGOING INSTRUMENT was acknowledged before me by means of ☒ physical presence or ☐ online notarization, this 3 day of Feb., 2020, by _____, who ☒ is personally known to me, or ☐ produced _____ as identification.



[Signature]
Notary Public Signature
Print Notary Name: Dianna L. Swords
My commission expires: 4/29/2020

CITY LOGO
HERE

INSPECTION REPORT

Jurisdiction: Sample Jurisdiction Property Address: 14XX XXXXXX RD, XXXXXX Date: Feb 4, 2020

Permit Number: XXXXX-0279-19 Inspector: Sample Inspector

Permit Type: New Single Family Applicant: SAMPLE APPLICANT
Residence

Schedule Notes:

Description of Work:
NEW SFR

Underground Plumbing
Inspections

Pass	Fail	Partial Pass	Cancel
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Corrections Required:

Sewer Tap
Inspections

Pass	Fail	Partial Pass	Cancel
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Corrections Required:

Date: Inspector:

Permit Number:

Address:

ONE AND TWO FAMILY DWELLING PLAN REVIEW CHECKLIST

The plan reviewers at the City of _____ endeavor to provide thorough and timely plan review based on the 2017 Florida Building Codes. In order for us to do this, it is important that the applicant provide all the information necessary for the review.

Below you will see a checklist of the general items we are looking for. This is not an exhaustive list. Each building is unique and has its own fingerprint. So, the applicant may be required to provide more information. But the list below should be sufficient for most construction projects. While certain things may not apply to your specific project (in which case you can mark N/A), the items marked with an asterisk (*) shall be required on all plans, without exception.

PLANS PACKAGE

- ___ * Plans may be signed/sealed or per approved alternative design (submit via ePlans)
- ___ * Wind speed, exposure type, wind importance factor, building category, pressure coefficient for all windows and doors, design criteria per Florida Building Code
- ___ * Designer's name, address, certification number, all pages, all pages numbered, labeled and addressed
- ___ Location of septic tank
- ___ Location of type of underground facilities, utilities and encasements
- ___ Approved site plan required
- ___ *Plans site specific

ELEVATIONS

- ___ Front, rear and side views with dimensions, windows and door locations
- ___ Exterior wall finish
- ___ Unusual grade – elevation
- ___ Chimney location
- ___ Roof pitch

FLOOR PLAN

- ___ * Floor Plan
- ___ * Square footage
- ___ Tempered glass in hazardous locations ___ Egress windows labeled
- ___ Label sizes for all doors and windows ___ Interior load bearing walls shown

FOUNDATION

- ___ Footer locations, depth and width
- ___ Rebar grade and size
- ___ Vertical cell locations
- ___ Slab description

Permit Number:

Address:

- ☐ Minimum 12" below undisturbed surface
- ☐ Wood clearance to ground shown
- ☐ Column footing and pad locations
- ☐ Interior footing, location and detail
- ☐ Floor framing details and layout
- ☐ Access and vent size and location

MASONRY WALLS

- ☐ Vertical steel detail
- ☐ Typical lintel and tie beam
- ☐ Typical wall and opening detail
- ☐ Bearing detail of wall to block wall
- ☐ Exterior finishes and wall coverings ☐ Change in height detail
- ☐ Non-continuous lintel and bond beam ☐ Retaining wall soil and bolts
- ☐ Ceiling, eave height and overhang projection

FRAME WALLS

- ☐ Bearing wall construction
- ☐ Header and opening details
- ☐ Anchor bolts spacing and size
- ☐ Wall sheathing and nailing schedule ☐ Connectors noted
- ☐ Interior bearing wall details
- ☐ 2 story wall construction detail
- ☐ Fire wall detail and rating
- ☐ Ceiling eaves and overhang projection

ROOF FRAMING

- ☐ Truss Engineering (Usually provided by truss manufacturer) ☐ Lift detail
- ☐ Common truss layout
- ☐ Common framing layout and details (This requires engineer to sign and seal plans)
- ☐ Marked spanning locations
- ☐ Strap schedule
- ☐ Truss bracing and blocking
- ☐ Roof sheathing and nailing schedule
- ☐ Valley framing detail
- ☐ Girder location and strapping required
- ☐ Interior bearing wall detail
- ☐ Gable end details and bracing requirements ☐ Roof covering type and installation

Building Department

Permit Number:

Address:

ELECTRICAL

- ☐ Service amps
- ☐ Smoke and carbon monoxide detector locations labeled
- ☐ Electric layout and panel location

MECHANICAL

- ☐ Equipment locations
- ☐ Signed energy form
- ☐ Manual J
- ☐ Approved structural details for air handlers installed in attic area
- ☐ Duct layout

PLUMBING

- ☐ Water heater location
- ☐ Fixture location and layout

GAS SYSTEM ☐ LP

- ☐ Natural

CONSTRUCTION DETAILS NOT DETERMINED BY INITIAL PLAN

- ☐ Stair, landing and railing details
- ☐ Bay window detail
- ☐ Chimney framing detail
- ☐ Dormer framing detail
- ☐ Entry construction detail
- ☐ Column strapping detail
- ☐ Post to beam and slab connectors
- ☐ Ceiling block installation details
- ☐ Skylight framing details
- ☐ 2nd Floor layout and connectors detail ☐ Knee wall construction detail
- ☐ Attic access location and size
- ☐ Current product approval numbers

Permit Number: _____

Address: _____

COMMERCIAL BUILDING - STRUCTURAL PLAN REVIEW CHECKLIST

The plan reviewers at the City of _____ endeavor to provide thorough and timely plan review based on the 2017 Florida Building Codes. In order for us to do this, it is important that the applicant provide all the information necessary for the review.

Below you will see a checklist of the general items we are looking for. This is not an exhaustive list. Each building is unique and has its own fingerprint. The applicant may be required to provide more information. But the list below should be sufficient for most construction projects. While certain items may not apply to your specific project (in which case you can mark N/A), the items marked with an asterisk (*) shall be required on all plans, without exception.

GENERAL PLAN REQUIREMENTS

- ____ * 1 - COMPLETED PERMIT APPLICATION
- ____ INCLUDE SITE OR PLOT PLANS FOR EACH SET
- ____ PRODUCT APPROVAL FORM FOR EACH SET
- ____ * DESIGN PROFESSIONAL SIGNED AND SEALED PLANS, EACH PAGE, EACH SET
(Original Sign & Seal)

PLANS REQUIRED

- ____ FOUNDATION PLAN (with dimensions)
- ____ * FLOOR PLAN (with dimensions)
- ____ ELEVATIONS (with dimensions)
- ____ TYPICAL WALL SECTIONS
- ____ LIFE SAFETY PLAN
- ____ DETAILS
- ____ ROOM SIZES
- ____ FLOOR HEIGHT
- ____ * CONSTRUCTION TYPE / FBC 6
- ____ * OCCUPANCY CLASSIFICATION / FBC 3
- ____ * SQ. FOOTAGE
- ____ BUILDING LIMITATION / FBC TABLE 500
- ____ * MINIMUM OCCUPANT LOAD

STRUCTURAL DESIGN CRITERIA

DESIGN LOADS

- ____ WIND CATEGORY
- ____ WIND SPEED
- ____ WIND EXPOSURE
- ____ INTERNAL PRESSURE
- ____ COMPONENT AND CLADDING
- ____ FLOOR LIVE LOAD
- ____ ROOF LIVE LOAD

FIRE RATED CONSTRUCTION

- ____ FIRE RESISTANCE RATING / FBC TABLE 601
- ____ FIRE RESISTANCE RATING CORRIDORS / FBC TABLE 1018.1
- ____ FIRE PARTITIONS / FBC 709
- ____ MIN. FIRE RESISTANCE WALLS, OPENINGS TABLE 705.1.2
- ____ FIRE RATED DOORS / FBC TABLE 715.4
- ____ UL LISTING DETAILS FOR FIRE RATED WALLS / FBC 703.2
- ____ SHAFT ENCLOSURES / FBC 708
- ____ FIREWALLS / FBC 706

Revised: 03/13/2018

Permit Number: _____

Address: _____

____ TENANT SEPARATION 704.3

EGRESS

____ EGRESS WIDTH / FBC 1005
____ EGRESS DOOR ILLUMINATION / FBC 1006
____ DOOR SWING 1008.1.2
____ MAIN DOOR SIZE (50%) OF OCCUPANT LOAD
____ PANIC HARDWARE / FBC 1008.1.10
____ TRAVEL DISTANCE / FBC 1016
____ COMMON PATH EGRESS / FBC 1014.3
____ DEAD ENDS / FBC 1018.4
____ STAIRS / FBC 1009
____ NUMBER OF EXITS / FBC 1021
____ RAMPS / FBC 1010
____ HANDRAILINGS / FBC 1012

ROOF

____ ROOF PITCH
____ TRUSS LAYOUT
____ TRUSS REACTIONS
____ CONNECTOR SCHEDULE / FBC 2309
____ SPECIAL ANCHORS / HANGERS
____ ROOF FLASHING / FBC 1503
____ ATTIC ACCESS / FBC 1209.2
____ ATTIC VENTILATION / FBC 1209.3

ADA

____ ACCESSIBLE ROUTE
____ DRINKING FOUNTAINS
____ ACCESSIBLE COIN-OPERATED VENDING MACHINES
____ RESTROOM GRAB BARS

MASONRY CONSTRUCTION

____ DOWEL EMBEDMENTS
____ COLUMN BRACING
____ GABLE BRACING
____ LINTEL SCHEDULE / MANUFACTURER
____ ROOF SHEATHING FASTENING

WOOD CONSTRUCTION

____ ANCHOR BOLTS FOR / PLACEMENT
____ REINFORCED CONCRETE / FIBERCRETE
____ GABLE BRACING
____ HEADER SCHEDULE
____ ROOF SHEATHING FASTENING
____ WALL SHEATHING FASTENING

SPECIAL REQUIREMENTS

____ SPRINKLER REQUIRED / FBC 903
____ THRESHOLD INSPECTOR REQ. / FBC 110.3.7
____ COMMERCIAL FUELING STATIONS / F.S.526.143
____ POSTING OCCUPANT LOAD / FBC 1004.3
____ ASSEMBLY / FBC 1028
____ MANUFACTURED BLDG. / FBC 428
____ HAZARDOUS GLASS / FBC 2406.4

A photograph of a large, mature green tree standing in a paved parking lot. In the foreground, a dark asphalt road features a white arrow pointing to the right. A chain-link fence runs across the middle ground, separating the road from the parking area. In the background, there are several buildings, including one with a red roof, and a few parked cars. The sky is blue with scattered white clouds. The text 'TAB 5' is overlaid on the right side of the image.

TAB 5

WORK HISTORY OF
KEY PERSONNEL

Work History of Key Personnel

We have designated a licensed, trained and experienced team of professionals who will assist the Town with the requested services. The team consist of:

- ☑ **Robert Kegan**, Primary Building Official, Fire Plans Examiner and Inspector
- ☑ **Raymond Schaub**, Alternate Building Official, Plans Examiner and Inspector
- ☑ **Jimmy Strickland**, Alternate Building Official, Plans Examiner and Inspector
- ☑ **Alex Zigmond**, Alternate 1&2 Family Dwelling, Mechanical and Plumbing Inspector

The detailed work histories of these individuals including training, certification and experience is included on the following pages.

ROBERT E. KEGAN, JR

Building Code
Administrator,
Building, Electrical,
Mechanical, & Plumbing
Inspector & Plans
Examiner,
Fire Inspector

Years of Experience: 30+

STATE OF FLORIDA LICENSES:

Building Code
Administrator, BU92

Standard Inspector, BN237

Standard Plans Examiner,
PX115

Fire Inspector/Plans
Examiner, 84162

Certified General
Contractor, CGC027755

EDUCATION:

Florida State Fire College

Barry University, N. Miami

Broward Community
College

Daytona Beach Community
College of Architecture

With an impeccable career in the construction industry, Bob has experience with Building Department Administration. Over the past thirty years, he has dedicated his career to working with cities and counties throughout Florida ensuring the Building Department is managed properly. Bob has served in the capacity of Building Official, Inspector, Plans Examiner, and Code Enforcement Officer. He joined the M.T. Causley family after retiring from Sumter County Building Department where he served as the Building Official for five years.

MUNICIPAL EXPERIENCE:

- **Sumter County**, Bushnell, FL - Building Official, Inspector, Plans Examiner
- **City of Mount Dora**, Mt. Dora, FL - Building Official, Fire Inspector
- **City of Parkland**, Parkland, FL - Building Official, Volunteer Firefighter
- **City of Tamarac**, Tamarac, FL - Deputy Building Official
- **City of Coral Springs**, Coral Springs, FL - Building Inspector
- **City of Plantation**, Plantation, FL - Building Inspector
- **Town of Palm Beach**, Palm Beach, FL - Plans Examiner
- **City of Bradenton Beach**, Bradenton Beach, FL - Building Official
- **City of Gulfport**, Gulfport, FL - Multi-Certified Inspector & Plans Examiner
- **City of Treasure Island**, Treasure Island, FL - Building Official
- **City of Inverness**, Inverness, FL - Building Official
- **City of Cedar Key**, Cedar Key, FL - Building Official
- **City of Coleman**, Coleman, FL - Building Official
- **City of Belleview**, Belleview, FL - Building Official

License information from the
Department of Business and Professional Regulation

Licensee Details

Licensee Information	
Name:	KEGAN, ROBERT E JR (Primary Name)
License Information	
License Type:	Building Code Administrator
Rank:	Building Code A
License Number:	BU92
Status:	Current,Active
Licensure Date:	03/15/1994
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Standard	
License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN237
Status:	Current,Active
Licensure Date:	03/15/1994
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Building	
Commercial Electric	
Mechanical	
Plumbing	
Residential Electric	
License Information	
License Type:	Standard Plans Examiner
Rank:	Plans Examiner
License Number:	PX115
Status:	Current,Active
Licensure Date:	03/15/1994
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Building	
Electrical	
Mechanical	
Plumbing	

RAYMOND L. SCHAUB

Building Code
Administrator, 1&2 Family
Dwelling, Building,
Electrical, Mechanical &
Plumbing Inspector
Building, Mechanical &
Plumbing Plans Examiner

Years of Experience: 25+

STATE OF FLORIDA LICENSES:

Building Code
Administrator, BU1522

Standard Inspector,
BN4800

Standard Plans Examiner,
PX2702

Home Inspector, HI4726

EDUCATION:

Associates Degree in
Business, Orlando College

Ray has over twenty years of experience in the construction industry responsible for the new construction of residential and commercial projects. He has been involved in a wide range of projects including high-rise mix-use developments, shopping centers, hospital, multi & single-family developments, industrial storage building, sewer & treatment plants and marinas.

For the last several years, he has been working for several municipalities carrying out the role of Building Official, Plans Examiner and Inspector (for building, mechanical, electrical and plumbing trades).

MUNICIPAL EXPERIENCE:

- **Lake County**, Tavares, FL - Building Inspector
- **Leelanau County**, Suttons Bay, MI - Multi-certified Inspector & Plans Examiner
- **Okeechobee County**, Okeechobee, FL - Building Official, Plans Examiner and Inspector, Flood Plain Manager
- **City of Eustis**, Eustis, FL - Building Official
- **University of Central Florida**, Orlando, FL - Multi-certified Inspector
- **Town of Welaka**, Welaka, FL - Building Official
- **City of Crescent City**, Crescent City, FL - Multi-certified Inspector & Plans Examiner
- **Town of Bronson**, Bronson, FL - Building Official
- **City of Chiefland**, Chiefland, FL - Building Official
- **Davenport Elementary**, Davenport, FL - Multi-certified Inspector
- **City of Dunnellon**, Dunnellon, FL - Building Official
- **City of Inverness**, Inverness, FL - Building Official
- **City of Minneola**, Minneola, FL - Building Official
- **Polk County**, Bartow, FL - Multi-certified Inspector
- **City of Williston**, Williston, FL - Building Official

License information obtained from

www.myfloridalicense.com

Licensee Details

Licensee Information	
Name:	SCHAUB, RAYMOND L (Primary Name)
License Information	
License Type:	Building Code Administrator
Rank:	Building Code A
License Number:	BU1522
Status:	Current,Active
Licensure Date:	10/27/2006
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Modular 1&2	10/27/2006

License Information	
License Type:	Standard Inspector
Rank:	Inspector
License Number:	BN4800
Status:	Current,Active
Licensure Date:	07/01/2004
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Building	09/13/2004
Electrical Inspector	06/15/2006
1&2 Family Dw	07/01/2004
Mechanical	01/07/2005
Plumbing	01/07/2005

License Information	
License Type:	Standard Plans Examiner
Rank:	Plans Examiner
License Number:	PX2702
Status:	Current,Active
Licensure Date:	06/02/2006
Expires:	11/30/2021
Special Qualifications	Qualification Effective
Building	05/08/2007
Mechanical	06/02/2006
Plumbing	05/08/2007

JIMMY L. STRICKLAND

Building Code
Administrator,
Building, 1&2 Family,
Electrical, Mechanical &
Plumbing Inspector

Years of Experience: 20+

STATE OF FLORIDA LICENSES:

Standard Building Code
Administrator, BU1878

Standard Inspector,
BN5176

EDUCATION:

State Technical Institute at
Memphis

ICC LICENSES:

Certified Building Official,
Combination Inspector,
Commercial Combination
Inspector

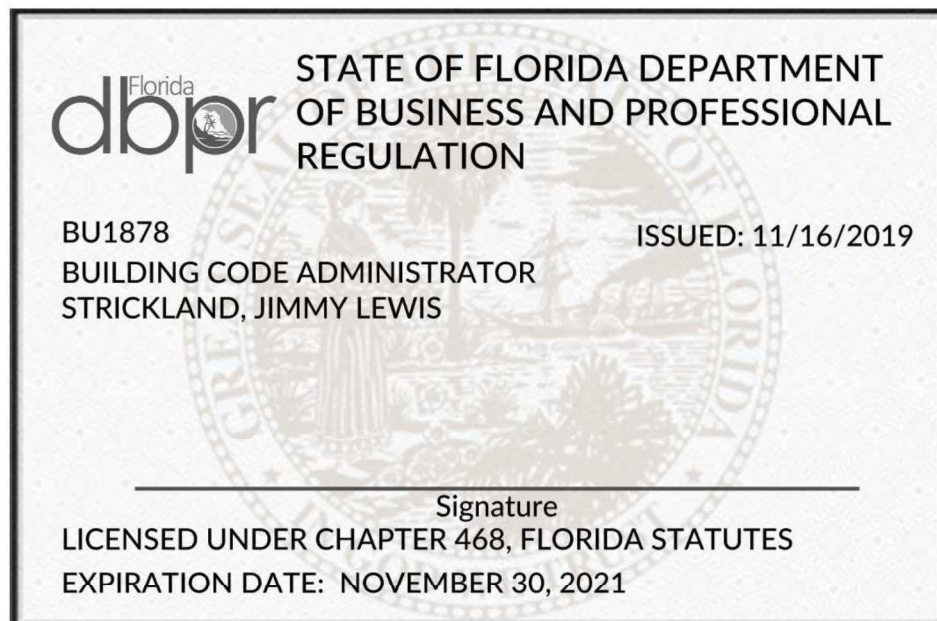
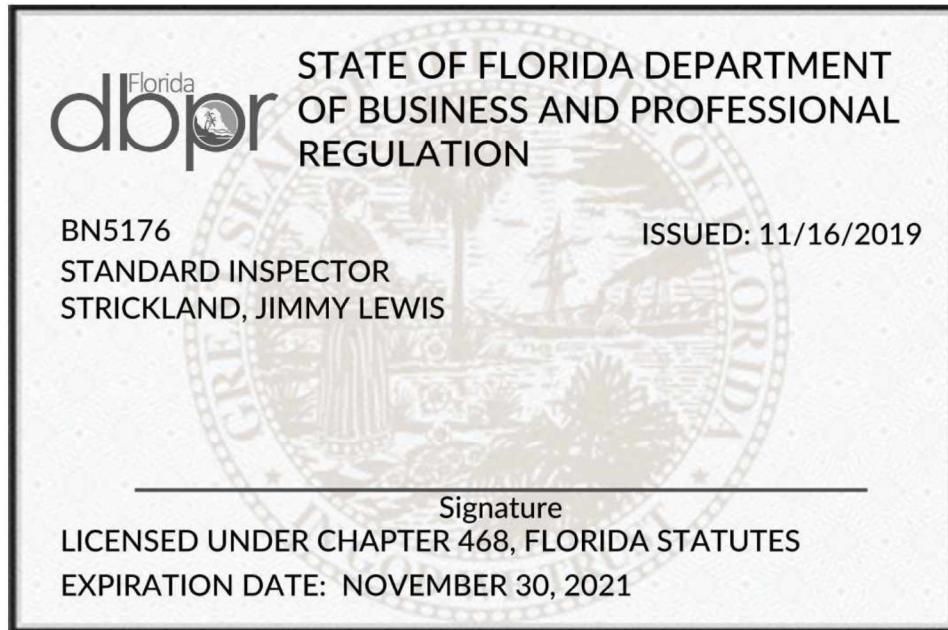
Jimmy has worked in the construction industry since 1985. He has experience with project coordination, budgeting and managing new and existing residential and commercial projects. Additionally, he has a successful record of overseeing all phases of multimillion-dollar construction projects for a wide range of clients and a proven history of completing projects on-time and on-budget.

Jimmy now dedicates his career to providing plans review and inspection services for various states including Florida, Mississippi and Tennessee. He was responsible for inspecting residential and commercial structures ensuring that their construction, alteration, or repair complies with the FBC and approved specifications. Working with different building departments, has provided him a wealth of knowledge and experience of daily operations within a building department.

MUNICIPAL EXPERIENCE:

- **Town of Yankeetown**, Yankeetown, FL- Building Official, Plan Reviewer and Inspector
- **City of Williston**, Williston, FL - Building Official, Plan Reviewer and Inspector
- **City of Palmetto**, Palmetto, FL- Building Official, Plan Reviewer and Inspector
- **Orange County**, Orlando, FL- Building Official, Plan Reviewer and Inspector
- **City of Inverness**, Inverness, FL - Multi-certified Inspector
- **City of Eustis**, Eustis, FL - Building Official
- **City of Dunnellon**, Dunnellon, FL - Building Official, Plan Reviewer and Inspector
- **City of Chiefland**, Chiefland, FL- Building Official, Plan Reviewer and Inspector
- **Town of Bronson**, Bronson, FL- Building Official, Plan Reviewer and Inspector
- **City of Belleview**, Belleview, FL - Building Official
- **City of Bradenton Beach**, Bradenton Beach, FL - Multi-certified Inspector

License information from the
Department of Business and Professional Regulation



ALEX ZIGMOND

1&2 Family Dwelling,
Mechanical & Plumbing
Inspector

Years of Experience: 20+

STATE OF FLORIDA LICENSES:

Standard Inspector,
BN5687

EDUCATION:

Trade and Business School,
New York

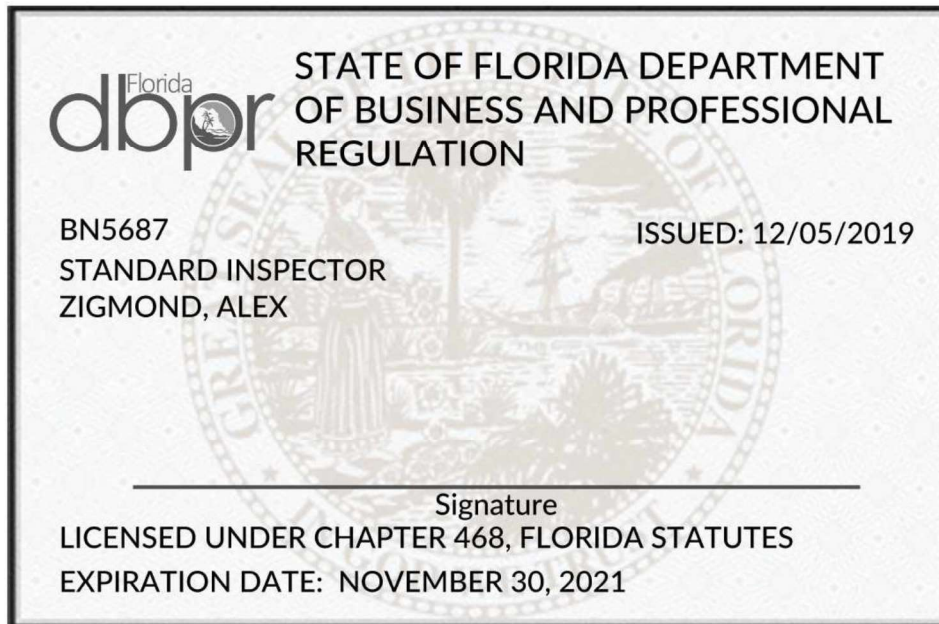
With over twenty years in the construction industry, Alex has extensive experience working on a wide range of residential and commercial projects. He has experience with planning layouts of pipe systems as well as installation and maintenance of venting systems, plumbing fixtures and traps.

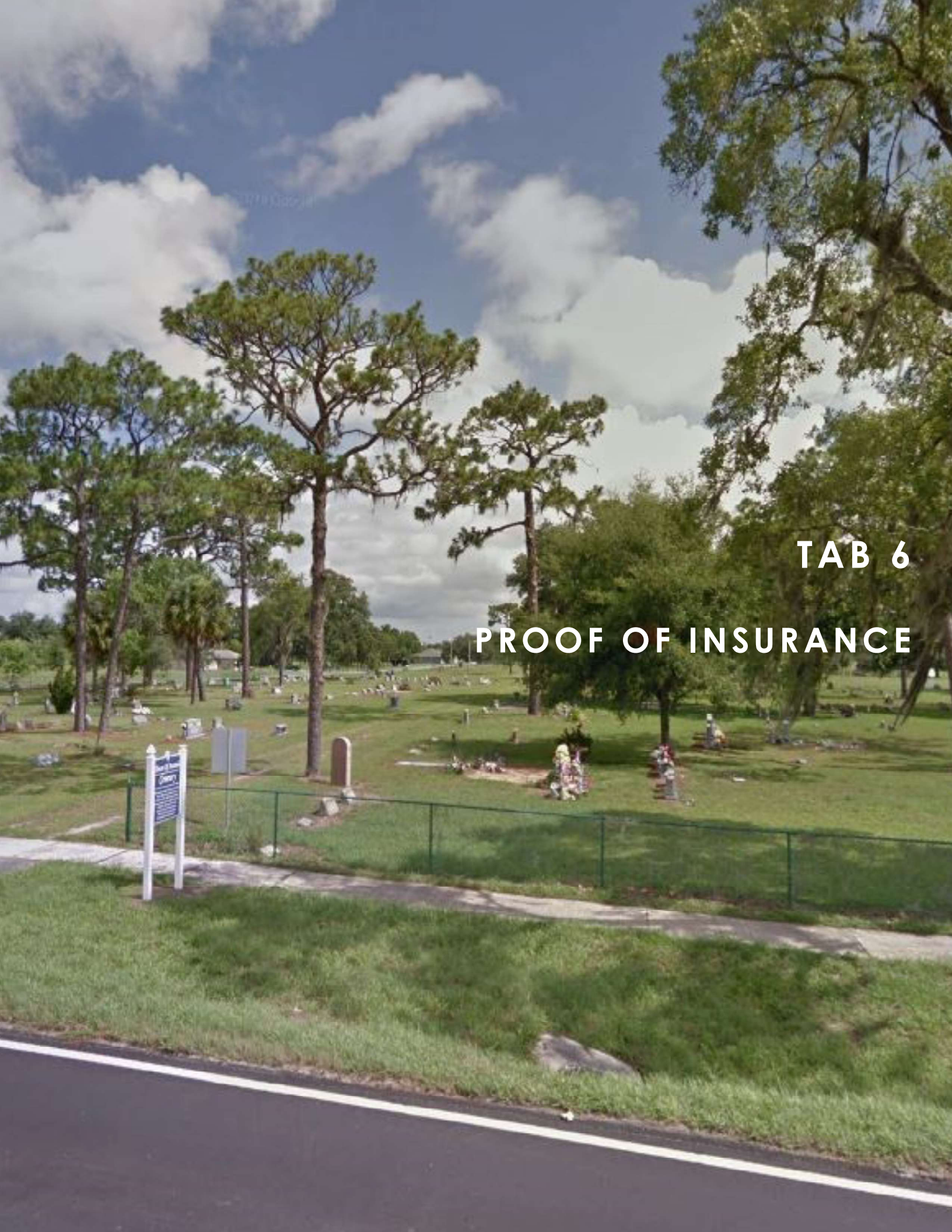
For more than ten years, Alex has been dedicated to ensuring construction of commercial structures complies with the Florida Building Code and approved specifications. Due to his experience, he has carried out the role of multi-certified inspector in the Cayman Islands. During his tenure, his responsibilities included inspecting all construction types for code compliance in the areas of building, plumbing, mechanical works and fire protection systems.

MUNICIPAL EXPERIENCE:

- **City of Clermont**, Clermont, FL - Multi-certified Inspector
- **City of Minneola**, Minneola, FL - Multi-certified Inspector
- **City of Anna Maria**, Anna Maria, FL - Multi-certified inspector
- **City of Bradenton Beach**, Bradenton Beach, FL - Multi-certified inspector
- **Pasco County**, New Port Richie, FL - Multi-certified inspector
- **Hernando County**, Brooksville, FL - Multi-certified inspector
- **Cayman Islands** - Multi-certified inspector
- **Village of North Palm Beach**, North Palm Beach, FL - Multi-certified Inspector
- **City of Gulfport**, Gulfport, FL - Multi-certified Inspector
- **City of Largo**, Largo, FL - Multi-certified Inspector
- **Indian River County**, Vero Beach, FL - Multi-certified Inspector

License information from the
Department of Business and Professional Regulation





TAB 6
PROOF OF INSURANCE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/25/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER RBN Insurance Services 303 E Wacker Dr Ste 650 Chicago IL 60601		CONTACT NAME: PHONE (A/C, No, Ext): 312-856-9400 FAX (A/C, No): 312-856-9425 E-MAIL ADDRESS: ckost@rbninsurance.com	
		INSURER(S) AFFORDING COVERAGE	
		NAIC #	
INSURED M. T. Causley, LLC 866 Ponce De Leon Blvd, 2nd Floor Coral Gables FL 33134		INSURER A: Hartford Fire Insurance Co. INSURER B: Hartford Casualty Insurance Co INSURER C: Navigators Insurance Company INSURER D: Twin City Fire Insurance Co. INSURER E: Great American E&S Ins. Co. INSURER F:	

COVERAGES

CERTIFICATE NUMBER: 1466642569

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		83UENZV3951	10/3/2019	10/3/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY		83UENPY9100	10/3/2019	10/3/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 0		CH19EXC885600IV	10/3/2019	10/3/2020	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/> N / A	83WECE0623	5/12/2019	5/12/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Professional Liability		TER285-99-95	10/3/2019	10/3/2020	Each Claim/Aggregate 9,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

For Information Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

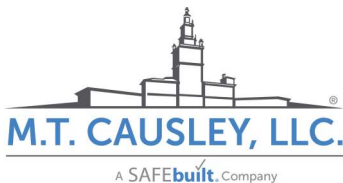
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TAB 7
SIMILAR SERVICES

Similar Services

A list of similar services provided to near by cities and counties in Florida have been included on the following pages. Included is a brief description of the services provided to each municipality along with the contact name and phone number of the individual who can discuss our firm's role and performance.





Town of Lady Lake, Lady Lake, FL

The Town of Lady Lake entered into a contract as a result of a Request for Proposal in 2016. Although we were not the highest overall ranked firm, the three committee members rated us higher. We provided a lower rate schedule and we seemed better suited to provide redundancy with an alternate staff team. In 2019, the Town issued a new RFP for Plan Review & Inspection Services. We were awarded the three year contract as part of the top ranked firms.

Contact Person: Thad Carroll, (352) 343-9653



City of Eustis, Eustis, FL

As a result of our existing contractual relationship with the Town of Lady Lake, the City of Eustis decided to piggyback the agreement in 2017. Since then, we've been assisting the City with a Building Official, Plan Review and Inspection Services.

Contact Person: Lori Barnes, (352) 483-5462



City of Dunedin, Dunedin, FL

In 2017, the City issued an RFP for Supplemental Plan Review and Inspection Services. As a result, we were awarded the contract. Since 2018, we have assisted the City with Plan Review and Inspection Services for all trades on an as-needed basis.

Contact Person: Joseph DiPasqua, (727) 298-3193



Sumter County, Bartow, FL

In November 2019, the County contacted us requesting assistance with their IAS annual review in addition to Plan Review and Inspection Services.

Contact Person: Joe Duennes, (352) 689-4400



Polk County, Bartow, FL

Earlier this year, Polk County released a Bid for Temporary Positions: Building Inspectors and Plans Examiners. We were amongst the four firms selected to assist the County with as-needed plan review and inspection services.

Contact Person: Chandra Frederick, (863) 534-6564



City of Bellevue, Bellevue, FL

We have been assisting the City since 2004 with a Building Official responsible for performing Plan Review and Inspections. We've become familiar with the City's processes and procedures as well as City staff, residents and contractors. Over the years, our staff has reviewed construction drawings and inspected the new and existing construction of thousands of commercial buildings and single family homes. Additionally, our Building Official assists with Flood Plain Management and ISO services.

Contact Person: Sandi McKamey (352) 233-2116



TAB 8

FEE PROPOSAL

Fee Proposal

Services will be provided based on the following Fee Proposal:

Service	Hourly Rate
Building Official: <ul style="list-style-type: none"> Residential and Commercial Inspection (all Trades) Residential and Commercial Plan Review (all Trades) Flood Plain Management 	\$105.00 per hour—two (2) hour minimum
<ul style="list-style-type: none"> CommunityCore Permitting Software 	No Cost
Additional Staff - as requested by the Town	
Residential and Commercial Inspection Services <ul style="list-style-type: none"> Includes Building, Electrical, Plumbing and Mechanical 	\$95.00 per hour - two (2) hour minimum
Residential and Commercial Plan Review Services <ul style="list-style-type: none"> Includes Building, Electrical, Plumbing and Mechanical 	\$95.00 per hour - two (2) hour minimum
Fire Plan Review and Inspection Services	\$105.00 per hour - two (2) hour minimum
Weekend/After Hours/Emergency Inspection Services	\$210.50 per hour - two (2) hour minimum
Time tracked will start when staff checks in at the Town or first inspection site.	